

FINANCIAL REPORT SUMMARY – INSTRUCTIONS

A Financial Report Summary must be filed by all registrants – both Lobbyists and Lobbyist Agents. The filing must be made even if there are no expenditures to report. Financial reports are due on the following dates:

Due Dates
August 31
January 31

Coverage Dates
January 1 - July 31
August 1 - December 31

Reports must be received by 4:00 p.m. on the due date to be considered timely. **Reports sent by certified or registered mail and postmarked two or more days before the deadline will be considered timely regardless of when they are received.** Late filing fees will be assessed for each calendar day a report is late.

Every section of the form must be completed. If any section does not apply, enter N/A for not applicable. Incomplete forms may be rejected and subject to late filing fees.

Item 1. Enter the name of the registrant on whose behalf this report is being submitted. Enter one name only as each Lobbyist and Lobbyist Agent must submit a separate report. Check the box if the registrant's name has changed since the last report was filed. This item cannot be used to register a person under the Lobby Act.

Item 2. Enter the registrant's identification number. (Note: Each registrant is issued a unique identification number.)

Item 3. Enter registrant's telephone number.

Item 4. Enter registrant's mailing address in 4a. Check the box if the registrant's mailing address has changed since the last report was filed. (All mail directed to the registrant through the Department of State, Bureau of Elections will be sent to the address listed in this item.) Enter the registrant's business address in 4b. If the registrant is an individual, address in 4c.

Item 5. Indicate the type of report being filed (5a for Summer or 5b for Winter) and the year of the report. If the report is being filed to amend a previous report, complete 5c and list the affected items. **If the registrant named in Item 1 no longer meets the definition of a Lobbyist or Lobbyist Agent and wishes to terminate the registration, complete 5d and enter the effective date of the termination.** Complete 5e to indicate if the registrant made any expenditures, which are itemized on an attached Itemized Expenditures form.

Item 6. Briefly describe the registrant's lobbying activities during the period covered by this report and place a check mark in the appropriate box. Example: Lobbied (for or against) passage of legislation concerning (briefly summarize legislation). **If the registrant did not engage in any lobbying activities during the period covered by this report, place a check mark in the box indicating there was no lobbying activity.**

Item 7. Enter totals for all direct expenditures made by the registrant during the period covered by this report (This Reporting Period) and since January of the year covered by the report (Year to Date).

Item 7a - Food and Beverage Provided to Public Officials (Reported regardless of purpose.)

Item 7b - Mass Mailing and Advertising (1000 pieces or more of similar mail sent within a 7-day period.)

Item 7c - All Other Lobbying Expenditures (Salary for Lobbyist Agents and other lobbying expenditures.)

Expenditures or compensation contingent upon the outcome of a legislative or administrative action is prohibited.

Item 8. Enter the name and business address of each person (to be added or deleted) employed, compensated or reimbursed by the registrant, named in Item 1, more than \$22.00 during any 12 month period for lobbying. The entry of a person's name, under Item 8, does not register or terminate the person under the Lobby Act.

Item 9. Sign the report. The report must be signed by the Lobbyist or Lobbyist Agent; if the registrant is not an individual, the report must be signed by a person authorized by the registrant. An original signature must be provided. Mail will be directed to the attention of the person who signs under Item 9.

Mail to: Michigan Dept. of State, Bureau of Elections Phone: (517) 373-2540 Web: www.michigan.gov/sos

For U.S. Mail:
Post Office Box 20126
Lansing, Michigan 48901-0726

For overnight delivery services, or to visit our office:
Richard H. Austin Building – 1st Floor, 430 West Allegan Street
Lansing, Michigan 48918