

Instructions

All candidates must complete Boxes A and B. Candidates who receive contributions or incur expenses must complete Boxes C, D, Schedule 1 and Schedule 2 as appropriate. Candidates who receive contributions or incur expenses in excess of \$10,000 must also attach an Auditor's Report.

All surplus funds (after any refund to the candidate or their spouse) shall be paid immediately over to the clerk who is responsible for the conduct of the election.

For the campaign period from (day candidate filed nomination)

YYYY	MM	DD
2 0 1 8	0 7	1 0

 to

YYYY	MM	DD
2 0 1 8	1 2	3 1

Initial filing reflecting finances to December 31 (or 45 days after voting day in a by-election)

Supplementary filing including finances after December 31 (or 45 days after voting day in a by-election)

Box A: Name of Candidate and Office

Candidate's name as shown on the ballot

Last Name or Single Name

Lee

Given Name(s)

Kevin

Office for which the candidate sought election

City and Regional Councillor

Ward name or no. (if any)

1

Municipality

Burlington

Spending Limit - General

\$ 21,796.85

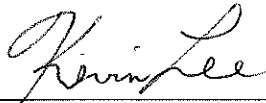
Spending Limit - Parties and Other Expressions of Appreciation

\$ 2,179.69

I did not accept any contributions or incur any expenses. (Complete Boxes A and B only)

Box B: Declaration

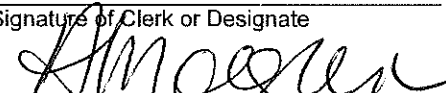
I, Kevin Lee, declare that to the best of my knowledge and belief that these financial statements and attached supporting schedules are true and correct.



Signature of Candidate

2019/03/22

Date (yyyy/mm/dd)

Date Filed (yyyy/mm/dd)	Time Filed	Initial of Candidate or Agent (if filed in person)	Signature of Clerk or Designate
2019/03/22	1:34pm	KL	

Box C: Statement of Campaign Income and Expenses**LOAN**

Name of bank or recognized lending institution _____
 Amount borrowed \$ _____

INCOME

Total amount of all contributions (from line 1A in Schedule 1)	+ \$	3,055.87
Revenue from items \$25 or less	+ \$	_____
Sign deposit refund	+ \$	_____
Revenue from fundraising events not deemed a contribution (from Part III of Schedule 2)	+ \$	_____
Interest earned by campaign bank account	+ \$	_____
Other (provide full details)		
1. _____	+ \$	_____
2. _____	+ \$	_____
3. _____	+ \$	_____
4. _____	+ \$	_____
5. _____	+ \$	_____
Total Campaign Income (Do not include loan)	= \$	3,055.87 c1

EXPENSES (Note: include the value of contributions of goods and services)**Expenses subject to general spending limit**

Inventory from previous campaign used in this campaign (list details in Table 4 of Schedule 1)	+ \$	_____
Advertising	+ \$	1,244.44
Brochures/flyers	+ \$	723.20
Signs (including sign deposit)	+ \$	960.50
Meetings hosted	+ \$	19.44
Office expenses incurred until voting day	+ \$	41.72
Phone and/or internet expenses incurred until voting day	+ \$	_____
Salaries, benefits, honoraria, professional fees incurred until voting day	+ \$	_____
Bank charges incurred until voting day	+ \$	_____
Interest charged on loan until voting day	+ \$	_____
Other (provide full details)		
1. Refreshments for meet and greet events	+ \$	28.66
2. Lucky draw prizes for meet and greet events	+ \$	7.06
3. Parking	+ \$	2.70
4. _____	+ \$	_____
5. _____	+ \$	_____
Total Expenses subject to general spending limit	= \$	3,027.72 c2

EXPENSES**Expenses subject to spending limit for parties and other expressions of appreciation**

1. Thank you cards	+ \$	24.41
2. _____	+ \$	_____
3. _____	+ \$	_____
4. _____	+ \$	_____
5. _____	+ \$	_____
Total Expenses subject to spending limit for parties and other expressions of appreciation	= \$	24.41 c3

Expenses not subject to spending limits

Accounting and audit	+ \$	
Cost of fundraising events/activities (list details in Part IV of Schedule 2)	+ \$	
Office expenses incurred after voting day	+ \$	
Phone and/or internet expenses incurred after voting day	+ \$	
Salaries, benefits, honoraria, professional fees incurred after voting day	+ \$	
Bank charges incurred after voting day	+ \$	7.55
Interest charged on loan after voting day	+ \$	
Expenses related to recount	+ \$	
Expenses related to controverted election	+ \$	
Expenses related to compliance audit	+ \$	
Expenses related to candidate's disability (provide full details)		
1.	+ \$	
2.	+ \$	
3.	+ \$	
4.	+ \$	
5.	+ \$	
Other (provide full details)		
1.	+ \$	
2.	+ \$	
3.	+ \$	
4.	+ \$	
5.	+ \$	
Total Expenses not subject to spending limits	= \$	7.55 C4

Total Campaign Expenses (C2 + C3 + C4) = \$ 3,059.68 C5

Box D: Calculation of Surplus or Deficit

Excess (deficiency) of income over expenses (Income minus Total Expenses) (C1 – C5)	+ \$	-3.81	D1
Eligible deficit carried forward by the candidate from the last election (applies to 2018 regular election only)	- \$		D2
Total (D1 – D2)	= \$	-3.81	
If there is a surplus, deduct any refund of candidate's or spouse's contributions to the campaign	- \$		
Surplus (or deficit) for the campaign	= \$	-3.81	D3

If line D3 shows a surplus, the amount must be paid in trust, at the time the financial statements are filed, to the municipal clerk who is responsible for the conduct of the election.

Schedule 1 - Contributions

Part I – Summary of Contributions

Contributions in money from candidate and spouse	+ \$ 224.40
Contributions in goods and services from candidate and spouse (include value listed in Table 3 and Table 4)	+ \$ 31.47
Total value of contributions not exceeding \$100 per contributor	
• Include ticket revenue, contributions in money, goods and services where the total contribution from a contributor is \$100 or less (do not include contributions from candidate or spouse).	+ \$ 450.00
Total value of contributions exceeding \$100 per contributor (from line 1B on page 5; list details in Table 1 and Table 2)	
• Include ticket revenue, contributions in money, goods and services where the total contribution from a contributor exceeds \$100 (do not include contributions from candidate or spouse).	+ \$ 2,350.00
Less: Contributions returned or payable to the contributor	– \$
Contributions paid or payable to the clerk, including contributions from anonymous sources exceeding \$25	– \$
Total Amount of Contributions (record under Income in Box C)	= \$ 3,055.87 1A

Part II – Contributions exceeding \$100 per contributor – individuals other than candidate or spouse

Table 1: Monetary contributions from individuals other than candidate or spouse

Name	Full Address	Date Received	Amount Received \$	Amount \$ Returned to Contributor or Paid to Clerk
Joseph Ross Byrne	727 King Road, Burlington, Ontario, L7T3K5	2018/07/28	1,200.00	
Ian Ham	690 Greenwood Drive, Burlington, Ontario, L7T3P3	2018/07/28	200.00	
Clarence C.W. Tam	139-1140 Burnhamthorpe Road West, Mississauga, Ontario, L5C4E9	2018/08/16	200.00	
Yee Hin Wong	2020 McNicoll Avenue, Unit 315, Scarborough, Ontario, M1V0B5	2018/08/23	200.00	
Frances Fendelet	1090 Westhaven Drive, Burlington, Ontario, L7P5B5	2018/09/13	150.00	
Brendan Chiu	248 North Shore Boulevard West, Burlington, Ontario, L7T1A4	2018/09/22	400.00	
			Total	2,350.00

Additional information is listed on separate supplementary attachment

Table 2: Contributions in goods or services from individuals other than candidate or spouse
 (Note: must also be recorded as Expenses in Box C)

Name	Full Address	Description of Goods or Services	Date Received (yyyy/mm/dd)	Value \$
<input type="checkbox"/> Additional information is listed on separate supplementary attachment			Total	

Total for Part II - Contributions exceeding \$100 per contributor
 (Add totals from Table 1 and Table 2 and record the total in Part 1 - Summary of Contributions) **\$ 2,350.00 1B**

Part III – Contributions from candidate or spouse

Table 3: Contributions in goods or services

Description of Goods or Services	Date Received (yyyy/mm/dd)	Value \$
Lucky draw prizes for meet and greet events		7.06
Thank you cards		24.41

Description of Goods or Services	Date Received (yyyy/mm/dd)	Value \$
<input type="checkbox"/> Additional information is listed on separate supplementary attachment	Total	31.47

Table 4: Inventory of campaign goods and materials from previous municipal campaign used in this campaign
 (Note: value must be recorded as a contribution from the candidate and as an expense)

Description	Date Acquired (yyyy/mm/dd)	Supplier	Quantity	Current Market Value \$
<input type="checkbox"/> Additional information is listed on separate supplementary attachment	Total			

City of Burlington
2018 Municipal Elections
Candidates Financial Information

Monetary contributions from individuals (other than candidate or spouse) over \$100

Use this spreadsheet to record all contributions received that exceed \$100 per contributor. This spreadsheet is required under the Municipal Elections Act, 1996 and must be attached to the Financial Statement (Form 4) when submitted.

Note: This is a public document and will be posted online with the Financial Statement on the Town's Election website after the filing deadline.

Candidates Name: Kevin Lee		Office: Ward 1 Councillor					
Contributors Last Name	Contributor's First Name	Street Address (Street, Unit)	City	Postal Code	Date Received (yyyy/mm/dd)	Amount (\$) Received	Amount (\$) returned to Contributor or Paid to Clerk (if any)
Byrne	Joseph	727 King Road	Burlington	L7T3K5	2018/07/28	\$ 1,200.00	\$ -
Ham	Ian	690 Greenwood Drive	Burlington	L7T3P3	2018/07/28	\$ 200.00	\$ -
Tam	Clarence	139-1140 Burnhamthorpe Rd W	Mississauga	L5C4E9	2018/08/16	\$ 200.00	\$ -
Wong	Yee Hin	2020 McNicoll Avenue, Unit 315	Scarborough	M1V0B5	2018/08/23	\$ 200.00	\$ -
Fendelet	Frances	1090 Westhaven Drive	Burlington	L7P5B5	2018/09/13	\$ 150.00	\$ -
Chiu	Brendan	248 North Shore Boulevard West	Burlington	L7T1A4	2018/09/22	\$ 400.00	\$ -
						\$ -	\$ -
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						\$ -	\$ -

Candidates Name: Kevin Lee		Office: Ward 1 Councillor					
Contributors Last Name	Contributor's First Name	Street Address (Street, Unit)	City	Postal Code	Date Received (yyyy/mm/dd)	Amount (\$) Received	Amount (\$) returned to Contributor or Paid to Clerk (if any)
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