

Board of Trustees

Required Forms and Filing for Candidates and Officeholders*

*The checklist below references the most common forms for candidates and officeholders.

Refer to the Texas Ethics Commission website at www.ethics.state.tx.us for the most current information on all candidate and officeholder reporting requirements.

Check -list	Action	Reason	Applicable forms
	File an application for a place on the ballot	Officially request name to be on the ballot for a place on the Board of Trustees	Application for a place on the Board of Trustees general election ballot
	Appoint a <u>campaign treasurer</u> prior to accepting campaign contributions or expending funds on the campaign	To accept campaign contributions or make any campaign expenditures (including personal funds)	Form CTA
	Change or update information for a <u>campaign treasurer</u>	To terminate your campaign treasurer and appoint a new treasurer or to update information on your campaign treasurer	Form ACTA
	Terminate a <u>campaign treasurer</u>	To end the appointment of a campaign treasurer	Form ACTA (to appoint a successor) or Form C/OH – FR (termination of a treasurer)
	Filing authority provides a copy of the <u>Code of Fair Campaign Practices</u> to each individual who appoints a campaign treasurer	Provides an opportunity for candidates to pledge to conduct his or her campaign in accordance with the principles and practices of the Code	Form CFCP (optional)
	<u>Report campaign contributions and expenditures</u> on the 30 th and 8 th day before the election	Required of all opposed candidates who did NOT declare modified reporting (see the campaign finance guide for conditions to declare modified reporting)	Form C/OH
	<u>Candidates</u> must file <u>periodic reports of contributions and expenditures</u> due January 15 and July 15.	Required of all candidates with a campaign treasurer on file	Form C/OH Coversheet and schedules on which you have information to report
	<u>Officeholders</u> must file <u>periodic reports of contributions and expenditures</u> due January 15 and July 15.	Required of all officeholders with a campaign treasurer on file <u>and</u> who exceed \$500 in contributions or expenditures during the filing period	Form C/OH Coversheet and schedules on which you have information to report
	File a <u>final report</u> to end filing obligations	Filing a final report terminates a filer's campaign treasurer appointment and relieves the filer from any additional filing obligations as a <u>candidate</u> (except if candidate has surplus political funds. See campaign finance guide)	Form C/OH (indicate "final") and Form C/OH - FR