

DATE: March, 2024

TO: Waukesha County Candidates for County Clerk, County Treasurer and Register of Deeds

FROM: Meg Wartman, Waukesha County Clerk

RE: 2024 Fall Wisconsin County Constitutional Officer Elections

The following information should be helpful to anyone intending to become a candidate for one of the above listed offices.

ELECTION DATES: Partisan Primary - August 13, 2024

Fall General Election - November 5, 2024

Attached are the following:

- Ballot Access Checklist for 2024 Partisan County Candidates (ELIS-16, Rev. 2023-08).
- Campaign Finance Registration Statement Local Candidate Committee (CF-Local, Rev. 9/23) should be filed or amended before campaign funds are collected or spent and prior to submitting nomination papers.
- **Declaration of Candidacy** (EL-162, Rev. 2019-08), which **must** be filed by the deadline for filing nomination papers.
- Campaign Finance Checklist for 2024 Partisan County Candidates (ETIS-17, Rev. 2023-09).
- Nomination Paper for Partisan Office (EL-168, Rev. 2016-03),

The **first day to circulate nomination papers is Monday, April 15, 2024.** A minimum of 500 and a maximum of 1000 signatures are required.

The deadline to file nomination papers is 5:00 p.m. on Monday, June 3, 2024, in the Waukesha County Clerk's Office, 515 W. Moreland Blvd, rm 120, Waukesha, WI. Only ORIGINALS will be accepted – no faxed or emailed documents.

If you have any questions completing any of the forms, please contact the Waukesha County Clerk's Office (262-548-7010), the Wisconsin Elections Commission (608-266-8005) or the Wisconsin Ethics Commission (608-266-8123).

2024 BALLOT ACCESS CHECKLIST FOR PARTISAN COUNTY CANDIDATES



Each of the following forms must be completed and filed on time by a candidate for county office in order for the candidate's name to be placed on the ballot for the **August 13, 2024 Partisan Primary** and **November 5, 2024 General Election** in Wisconsin.

•	an county candidates is the county clerk, except in Milwaukee County where the filing
	ounty Board of Election Commissioners. Candidates should contact their filing officer
	o obtain any of the necessary forms.
thar ame	mplete and submit a Registration Statement (Form <u>CF-1</u>) to the filing officer no later in 5:00 p.m., on Monday, June 3, 2024. A Registration Statement should be filed or ended before campaign funds are collected or spent and prior to submitting nomination pers.
> <u>I</u>	New candidates File a Registration Statement (Form CF-1) before campaign funds are collected or spent or before submitting nomination papers. Wis. Stat. §§ 11.0202(1)(a), 11.0101(1).
A e p	Continuing candidates Amend your current registration, indicating the office sought and the new primary and lection dates before funds are collected or spent or before submitting nomination apers. S. Stat. §§ 11.0202(1)(a),11.0101(1).
Declai Mond is faxe	mplete and Submit a Declaration of Candidacy (Form EL-162) to the filing officer. The ration of Candidacy must be received by the filing officer no later than 5:00 p.m., on ay, June 3, 2024, or the candidate's name will not be placed on the ballot. If the form ed or emailed, the original document must follow, postmarked no later than June 3, Wis. Stat. §§ 8.15(4)(b), 8.21, 8.30(4), EL § 6.04, Wis. Adm. Code.
ther pap pho 5:00	culate and Submit Nomination Paper for Partisan Office (Form EL-168) and submit m to the filing officer no later than 5:00 p.m., on Monday June 3, 2024. Nomination pers may not be circulated before April 15, 2024. Original nomination papers (no stocopies, faxes or emailed documents) must be received by the filing officer no later than 0 p.m. on Monday, June 3, 2024 or the candidate's name will not be placed on the ballot. Stat. § 8.15(1), Wis. Admin. Code EL 6.04(2).
The number	of signatures required in Waukesha County are as follows:

Important Note Regarding Statements of Economic Interests:

In counties with population over 100,000

A county may enact an ordinance establishing a code of ethics for public officials that may require a candidate for county office to file a *Statement of Economic Interests (SEI)*. The ordinance may also provide that failure to timely file an SEI will prevent the candidate's name from being placed on the ballot. Wis. Stat. § 19.59(1m),(3)(b). Please contact the filing officer to learn if this requirement applies to you.

500 - 1,000



Campaign Finance Registration Statement — Local Candidate Committee

STATE OF WISCONSIN

1. Is this an Amendment? No Yes

SECTION A: GENERAL											
A1. Committee Name (Required for	r all Cand	idates - must be incl	luded in disclaime	r on all comm	unications)						
A2. Email	A3. Phone										
A4. Mailing Address	A5. City				A6. State A7. Zip						
Depository Institution Information						ı					
A8. Institution Name		A9. Street Addres	SS	A	10. City	A11. St	ate	A12. Zip			
Treasurer/Administrator Information	n			<u> </u>							
A13. Name		A14. Email			A15. I	A15. Phone					
A16. Mailing Address	A17. City			A18. State A19. Zip							
Other Officers (Optional)											
A20. Name	A21. Tit	le	A22. Email			A23. Phone					
A24. Name	A25. Tit	ile	A26. Email			A27. Phone					
Filing Exemption A28. Exemption Affirmation											
Registrants which do not anticipate of incurring obligations in an aggregate exemption from filing campaign finance \$2,500 aggregate activity threshold and	exceeding \$2,500 in This exemption appli	a calendar year may claim an ies until the registrant exceeds the				egistrant is eligible for exemption. gistrant is not eligible for exemption.					
\$2,500 aggregate activity threshold, am	unatea.										
SECTION B: CANDIDATE INFORMATION											
B1. Office Sought (include District/B	B2. Political Party				B3. Election Date						
Candidate Information				·							
B4. Name		B5. Email			B6. Phone						
B7. Mailing Address	B7. Mailing Address			B8. City			B9. State	B10. Zip			
Second Candidate Committee				B11. Is this	your only regi	stered c	andidate com	mitte	e in Wisconsin?		
An individual who holds a state or loca candidate committee to pursue another		Yes, this is my only candidate committee in Wisconsin. No, this is my second candidate committee in Wisconsin.									
B12. Other Office Held or Sought (in	clude Dist	rict/Branch) Only co	omplete B12 if you	responded "No	o" to B11.						

SECTION C: CERTIFICATION							
Accurate Information							
☐ I certify that I am an authorized representative of the this registration is true, correct, and complete.	Y						
Timely Amendments							
☐ I am aware of the requirement to amend this regist any change to the candidate committee's eligibility.	tration statement within 10 days of any change of information contain for exemption from campaign finance reporting.	ed within, including					
Records Retention							
G 1	I acknowledge the requirement to maintain the records of the candidate committee in an organized and legible manner for three years from the close of the most recent contribution limit period (June 30 following the April election, December 31 following the November election).						
Continuing Compliance							
I acknowledge that I am required to continue to comply with all applicable requirements under Chapter 11 of the Wisconsin Statutes until this registration is terminated. I understand that I am not released from any liability simply because the election date has passed.							
Treasurer							
C1. Printed Name	C2. Signature	C3. Date					
Candidate							
C4. Printed Name	C5. Signature	C6. Date					

Form Instructions

Candidates must complete all sections A, B, and C.

Item 1. Is this an amendment? Have you registered with this local clerk to run for office in a prior election?

Item A1: Committee Name. All candidates are required to register a committee. It is not required that the name include the candidate's name, but it is recommended. This committee name is required to be part of the disclaimer on all communications with express advocacy: 'Paid for by ...'

A28: Exemption. Candidates claiming exemption may not have more than \$2,500 of activity, in the aggregate per year. For example, in a calendar year, if you raise \$1,600 and spend \$1,000 you have \$2,600 of aggregate activity and are not eligible to claim exemption.

Depository Institution Information. All candidates must designate a depository institution. While it is recommended that all candidates have a designated campaign depository account, candidates who will serve as their own treasurer may designate a single personal account to serve as the committee depository account while claiming a filing exemption and may intermingle personal and campaign funds (Wis. Stat. § 11.0201(2)(b)).

Treasurer Information. Each committee must appoint a treasurer. Any adult may serve as a treasurer. A candidate may serve as his or her own treasurer. If a candidate is serving as their own treasurer, please indicate 'Self' or 'Candidate', you do not need to list your complete name, address and contact information here, that will be listed in section B.

Section B: Candidate Information

- **B1.** Be sure to include the name of the county, municipality, or school district. There are 72 counties with county supervisors, 100's of school boards, and 1000's of municipal boards.
- **B2.** Party NA or None for nonpartisan offices (April); Democrat, Republican, Constitution, Green, Independent, or other ballot status party for partisan offices (November).

Section C: Certification. All candidates must complete section C. If the candidate is serving as their own treasurer, they would only need to sign once, as either the candidate or treasurer.

Declaration of Candidacy

(See instructions for preparation on back)

FOR OFFICE USE ONLY	

NOTARY SEAL REQUIRED, IF OATH ADMINISTERED BY

NOTARY PUBLIC

Is this an amendment? Yes (if you have already filed a DOC for this election) **No** (if this is the first DOC you have filed for this election) _____, being duly sworn, state that Candidate's name I am a candidate for the office of Official name of office - Include district, branch or seat number representing If <u>partisan election</u>, name of political party or statement of principle - five words or less (*Candidates for nonpartisan office may leave blank*.) and I meet or will meet at the time I assume office the applicable age, citizenship, residency and voting qualification requirements, if any, prescribed by the constitutions and laws of the United States and the State of Wisconsin, and that I will otherwise qualify for office, if nominated and elected. I have not been convicted of a felony in any court within the United States for which I have not been pardoned.¹ My present address, including my municipality of residence for voting purposes is: Town of \Box Village of City of House or fire no. Street Name Mailing Municipality and State Zip code Municipality of Residence for Voting My name as I wish it to appear on the official ballot is as follows: (Any combination of first name, middle name or initials with surname. A nickname may replace a legal name.) (Signature of candidate) STATE OF WISCONSIN

(Official title, if not a notary)

If Notary Public: My commission expires _____ or □ is permanent.

Subscribed and sworn to before me this _____day of ______, _____.

(Signature of person authorized to administer oaths)

County of _

(County where oath administered)

□ Notary Public or □ other official _____

The information on this form is required by Wis. Stat. § 8.21, Art. XIII, Sec. 3, Wis. Const., and must be filed with the filing officer in order to have a candidate's name placed on the ballot. Wis. Stats. §§ 8.05 (1)(j), 8.10 (5), 8.15 (4)(b), 8.20 (6), 120.06 (6)(b), 887.01.

EL-162 | Rev. 2019-08 | Wisconsin Elections Commission, P.O. Box 7984, Madison, WI 53707-7984 608-266-8005 | web: elections.wi.gov | email: elections@wi.gov

¹ A 1996 constitutional amendment bars any candidate convicted of a misdemeanor which violates the public trust from running for or holding a public office. However, the legislature has not defined which misdemeanors violate the public trust. A candidate convicted of any misdemeanor is not barred from running for or holding a public office until the legislature defines which misdemeanors apply.

Instructions for Completing the Declaration of Candidacy

All candidates seeking ballot status for election to any office in the State of Wisconsin must properly complete and file a *Declaration of Candidacy*. This form must be **ON FILE** with the proper filing officer no later than the deadline for filing nomination papers or the candidate's name will not appear on the ballot. A facsimile will be accepted if the FAX copy is received by the filing officer no later than the filing deadline **and** the signed original declaration is received by the filing officer with a postmark no later than the filing deadline.

Information to be provided by the candidate:

- Type or print your name on the first line.
- The title of the office and **any district**, **branch**, **or seat number** for which you are seeking election must be inserted on the second line. For legislative offices insert the title and district number, for district attorneys insert the title and the county, for circuit court offices insert the title, county and branch number, and for municipal and school board offices insert the title and any district or seat number.
- > Type or print the political party affiliation or principle supported by you in five words or less on the third line. Nonpartisan candidates may leave this line blank.
- Felony convictions: Your name cannot appear on the ballot if you have been convicted of a felony in any court in the United States for which you have not been pardoned. Please see footnote on page 1 for further information with respect to convictions for misdemeanors involving a violation of public trust. These restrictions only apply to candidates for state and local office.
- Your current address, including your municipality of residence for voting purposes, must be inserted on the fourth line. This must include your entire mailing address (street and number, municipality where you receive mail) and the name of the municipality in which you reside and vote (town, village, or city of ___). If your address changes before the election, an amended Declaration of Candidacy must be filed with the filing officer. Wis. Stat. § 8.21. Federal candidates are not required to provide this information, however an address for contact purposes is helpful.
- Type or print your name on the fifth line as you want it to be printed on the official ballot. You may use your full legal name, former legal surname, or any combination of first name, middle name, and initials, surname or nickname with last name.

Note: The Wisconsin Elections Commission has determined that, absent any evidence of an attempt to manipulate the electoral process, candidates are permitted to choose any form of their name, including nicknames, by which they want to appear on the ballot.

No titles are permitted. In addition, names such as "Red" or "Skip" are permitted, but names which have an apparent electoral purpose or benefit, such as "Lower taxes," "None of the above" or "Lower Spending" are not permitted. It is also not permissible to add nicknames in quotes or parentheses. For example, John "Jack" Jones or John (Jack) Jones are not acceptable, but John Jones, Jack Jones or John Jack Jones are acceptable.

This form must be sworn to and signed in the presence of a notary public or other person authorized to administer oaths, such as a county or municipal clerk. Wis. Stat. §§ 8.21(2), 887.01(1).

Information to be provided by the person administering the oath:

- The county where the oath was administered.
- > The date the Declaration of Candidacy was signed and the oath administered.
- The signature and title of the person administering the oath. If signed by a notary public, the notary seal is required and the date the notary's commission expires must be listed.

All candidates for offices using the nomination paper process must file this form (and all school district candidates must file the EL-162sd) with the appropriate filing officer no later than the deadline for filing nomination papers. Wis. Stats. §§ 8.10 (5), 8.15 (4)(b), 8.20 (6), 8.21, 8.50 (3)(a), 120.06 (6)(b). Candidates nominated for local office at a caucus must file this form with their municipal clerk within 5 days of receiving notice of nomination. Wis. Stat. § 8.05 (I)(j).

NOMINATION PAPER FOR PARTISAN OFFICE

Candidate's name (required); no titles may be used.			Candidate's residential address (required) No P.O. box addresses Street, fire, or rural route number; box number (if rural route); and name of street or road Town of Village of City of								(required).
different than residential address or voting municipality)			State (required) Zip code		Type of election (required) general special		General Election date (required) Mo/Day/Year		(name of municipality) (Required) Name of Party or Statement of Principle (5 words or less)		,,
Title of office (required)							Name of jurisdi	risdiction or district in which candidate seeks office (required)			
l, the undersigned, request that the candidate, who statement of principle indicated above, so that vote candidate named above seeks office. I have not sig	ers will have the opp	ortunity t	o vote	for 🖵 him or	her for tl	he office listed above. I	am eligible t	d above as a c o vote in the j	candidate repre jurisdiction or c	senting listrict ir	the party or n which the
The municipality used for mailing purposes,	when different th	nan muni	cipalit	y of residence	ce, is not s	sufficient. The name	of the mun	icipality of r	esidence mus	t alwa	ys be listed.
Signatures of Electors	Printed Name of Electors			-	Residential Address (No P.O. Box Addresses) Street and Number or Rural Route (Rural address must also include box or fire no)					e	Date of Signing Mo/Day/Year
1.								□ Town □ Village □ City			
2.								☐ Town ☐ Village ☐ City			
3.								□ Town □ Village □ City			
4.								☐ Town☐ Village☐ City			
5.								☐ Town☐ Village☐ City			
6.								☐ Town☐ Village☐ City			
7.								□ Town □ Village □ City			
8.								□ Town □ Village □ City			
9.								☐ Town☐ Village☐ City			
10.								☐ Town☐ Village☐ City			
			CF	RTIFICATION	N OF CIRC	`UI ATOR					
l,(Name of circulator)				/: I reside at _		(Circulator's residential add	lress - Include n u	mber, street, and	d municipality)		_··
I further certify I am either a qualified elector of Wi circulated this nomination paper and personally ob that each person signed the paper with full knowled aware that falsifying this certification is punishable	tained each of the sidge of its content or	ignatures the date	on this indicat	paper. I knov	v that the s	igners are electors of th	e jurisdiction	or district the	e candidate see	eks to re	present. I know
(Date)				(Signature of circulator)						Page	No.

INSTRUCTIONS FOR PREPARING NOMINATION PAPERS FOR PARTISAN OFFICE

This is a sample nomination paper form. It conforms to the statutory requirements for nomination papers for partisan office. All information concerning the candidate must be completed in full before circulating this form to obtain signatures of electors. All information concerning the signing electors and the circulator must be completed in full before filing with the appropriate filing officer. This form may be reproduced in any way. A candidate's picture and campaign information may also be added to this form. The Wisconsin Elections Commission has determined that no disclaimer or other attribution statement is required on nomination papers. Candidates are advised to send a sample of their completed form to the filing officer for review before circulation. Federal and state candidates file with the Wisconsin Elections Commission. County candidates file with the County Clerk.

Page Numbers – Number each page consecutively, beginning with "1", before submitting to the filing officer. A space for page numbers has been provided in the lower right-hand corner of the form.

<u>Candidate's Name</u> - Insert the candidate's name. A candidate may use his or her full legal name, or any combination of first name, middle name, and initials or nickname with last name. The Wisconsin Elections Commission has determined that, absent any evidence of an attempt to manipulate the electoral process, candidates are permitted to choose any form of their name, including nicknames, by which they want to appear on the ballot.

No titles are permitted. In addition, names such as "Red" or "Skip" are permitted, but names that have an apparent electoral purpose or benefit, such as "Lower taxes," "None of the above" or "Lower Spending" are not permitted. It is also not permissible to add nicknames in quotes or parentheses between first and last names. For example, John "Jack" Jones or John (Jack) Jones are not acceptable, but John Jones, Jack Jones or John Jack Jones are acceptable.

<u>Candidate's Residence</u> – Insert the candidate's residential address (*no P.O. Box addresses*) and the municipality for voting purposes. Indicate if the municipality of residence is a town, village or city. If a candidate's mailing address is different from the residential address or voting municipality, a complete mailing address must also be given.

<u>Date of Election</u> - Insert the date of the election. If the nomination paper is being circulated for a general election, the date is the Tuesday after the first Monday in November of an even-numbered year. If the election is a special partisan election, the date of the special election must be listed.

Party or Statement of Principle – Insert the name of the party the candidate represents. Independent candidates may provide a Statement of Principle, not to exceed 5 words.

<u>Title of Office</u> - The name of the office must be listed <u>along with the jurisdiction or district number</u> that clearly identifies the office the candidate is seeking, for example, Representative to the Assembly – 1st district or Dane County District Attorney.

Name of Jurisdiction - The nomination papers must also indicate the municipality or jurisdiction in which the signing electors are qualified to vote, as it relates to the office sought by the candidate named on the nomination paper. For example, for a statewide office the jurisdiction is the State of Wisconsin. Other examples are 1st Congressional District, 24th Assembly District or Brown County.

Signatures and Printed Names of Electors - Only qualified electors of the jurisdiction or the district the candidate seeks to represent may sign the nomination papers. Each signer must also legibly print their name. Each elector must provide their residential address (no P.O. Box addresses), including any street, fire or rural route number, box number (if rural route) and street or road name and municipality of residence. A post office box number alone does not show where the elector actually resides. The name of the Municipality of Residence must be listed for each signing elector and must clearly identify the town, village or city where the elector's voting residence is located. The date the elector signed the nomination paper, including month, day and year, must be indicated. Ditto marks that follow correct and complete address or date information are acceptable. The circulator may add any missing or illegible address or date information before the papers are filed with the filing officer.

<u>Signature of Circulator</u> - The circulator should carefully read the language of the *Certification of Circulator*. The circulator must personally present the nomination paper to each signer. **The nomination**Paper May <u>Not</u> be <u>left unattended on counters or posted on bulletin boards</u>. The circulator's complete residential address including municipality of residence must be listed in the certification. **After** obtaining signatures of electors, the circulator must sign and date the certification.

Other Instructions - Candidates and circulators should review Ch. Wisconsin Elections Commission §§ 2.05, 2.07, Wis. Adm. Code.

- > Original nomination papers must be in the physical custody of the appropriate filing officer by the filing deadline. A postmark on the filing deadline is **NOT** sufficient. Nomination papers **cannot** be faxed/emailed to the filing officer. Ch. Wisconsin Elections Commission § 6.04(2), Wis. Adm. Code.
- Nomination papers with the required number of signatures must be filed with the appropriate filing officer **no later than 5:00 p.m.** on June 1st (or the next day if June 1st is a holiday or weekend) before the general election. Nomination papers may not be circulated before April 15. Special elections may have different circulation time frames and filing deadlines. Check with the filing officer.
- In order for a candidate's name to be placed on the ballot, a candidate must file a *Campaign Registration Statement* (ETHCF-1), a *Declaration of Candidacy* (EL-162), and *Nomination Papers* (EL-168) containing the appropriate number of signatures for the office sought no later than the filing deadline. Wis. Stat. § 8.15(6). Candidates for state office and municipal judge must also file a Statement of Economic Interests with the Wisconsin Ethics Commission by the third business day after the nomination paper filing deadline. Wis. Stat. § 19.43. If any one of these required forms is not filed by the deadline, the candidate's name will not be placed on the ballot. Wis. Stat. § 8.30.
- If a candidate or circulator has any questions, he or she should contact the filing officer.

CAMPAIGN FINANCE CHECKLIST FOR 2024 PARTISAN COUNTY CANDIDATES

Candidates for partisan county office should determine if they are required to make financial disclosure reports. The filing officer for partisan county candidates is the county clerk, except in Milwaukee County where the filing officer is the Milwaukee County Board of Election Commissioners. Candidates should contact their filing officer for further information or to obtain any of the necessary forms. WIS. STATS. §§ 11.0102(1)(b), 11.0102(3)(c)

If NOT	claiming the exemption from reporting requirements:
	Obtain a copy of the <i>Campaign Finance Overview – Local Candidates</i> Manual (Revised 2023) from your filing officer and carefully review it with your treasurer.
	Complete and submit a <i>July Continuing Campaign Finance Report</i> (Form CF-2L) to the filing officer no later than July 15, 2024 . This report covers activity from January 1, 2024, or the date of registration (whichever is later), through June 30, 2024. WIS. STATS. §§ 11.0204(4)(d) 11.0103(3)(a)2.
	Complete and submit a <i>Pre-Primary Campaign Finance Report</i> (Form CF-2L) to the filing officer no later than August 5, 2024 . This report covers activity from July 1, 2024, through July 29, 2024. Wis. STATS. §§ 11.0204(4)(a), 11.0103(3)(a)1.
	Complete and submit a September Continuing Campaign Finance Report (Form CF-2L) to the filing officer no later than September 30, 2024 . This report covers activity from July 30, 2024, through September 23, 2024. Wis. STATS. §§ 11.0204(4)(e) 11.0103(3)(a)4.
	Complete and submit a <i>Pre-Election Campaign Finance Report</i> (Form CF-2L) to the filing officer no later than October 28, 2024 . This report covers activity from September 24, 2024, through October 21, 2024. WIS. STATS. §§ 11.0204(4)(b), 11.0204(5)(a), 11.0103(3)(a)1.
	Complete and submit a <i>January Continuing Campaign Finance Report</i> (Form CF-2L) to the

Note: Candidates are required to continue filing Campaign Finance Reports, regardless of the results of the Primary or Election. *Wis. Stat.* §11.0207. *An individual that has won the election and holding office is defined as a candidate, and therefore must remain registered and cannot terminate while in office. Wis. Stats.* §§11.0202(1)(a), 11.0101(1)(b) TIS-17 | Rev 2023-09 | Wisconsin Ethics Commission, P.O. Box 7125, Madison, WI 53707-7125 |608-266-8123 | https://ethics.wi.gov | CampaignFinance@wi.gov

December 31, 2024. Wis. Stats. §§ 11.0204(4)(c),11.0204(5)(b), 11.0103(3)(a)2.

filing officer no later than January 15, 2025. This covers activity from October 22, 2024, through