

**Annual Town
Election**

Monday, April 1, 2024

**Candidates
Packet**

Cheryl C.A. Estrella, CMC
Town Clerk



Office of the Town Clerk

3 North Main St. / PO Box 438

Assonet, MA 02702

www.freetownma.gov

508-644-2201

townclerk@freetownma.gov

“The credit belongs to the man who is actually in the arena, whose face is marred by dust and sweat and blood; who strives valiantly; who errs, who comes short again and again, because there is no effort without error and shortcoming; but who does actually strive to do the deeds; who knows great enthusiasms, the great devotions; who spends himself in a worthy cause; who at the best knows in the end the triumph of high achievement, and who at the worst, if he fails, at least fails while daring greatly, so that his place shall never be with those cold and timid souls who neither know victory nor defeat.”

-Theodore Roosevelt, “The Man in the Arena” (1910)

Congratulations! You have taken a courageous step by declaring your candidacy for elected office. For any government to work effectively, especially your local Town Government, it requires the active participation of its citizens. Democracy functions best when the citizenry is given a choice. The Office of the Town Clerk thanks you for your active participation and wishes you the best of luck in your campaign.

The Office of the Town Clerk is here to assist you as you navigate through the local election process. A Candidates Packet is available on the Town’s website that provides the following:

- Running for Office in Freetown – Quick Checklist
- Election Calendar
- Positions on Ballot / Terms Due to Expire
- Statement of Candidacy
- Campaign Finance Materials
- Political Sign Policy

I again extend my gratitude to you for placing yourself “in the arena”, and if you have any questions, please do not hesitate to contact me.

Best of luck!

Cheryl C.A. Estrella

Cheryl C.A. Estrella, CMC
Town Clerk

Check List for Running for Office in the Town of Freetown

"A Candidate's Guide to Running for Town Election"

- ✓ Review List of **Terms Due to Expire** for listing of positions available on this year's ballot.
- ✓ Review **Annual Town Election Calendar/Key Dates to Remember**.
Note the last day to obtain and submit nomination papers.
- ✓ Obtain **Nomination Papers**. Circulate for signatures. Be sure to submit more than the required number of signatures (50 signatures for Regional School District Committee positions, 40 for all other positions) for certification so you do not fall short in the event of signatures not certified. All signatures must be legible and written substantially as registered. The law allows a voter to insert or omit a middle name or initial and still have the signature deemed valid. Do not use nicknames or initials in place of full names. Married women should sign "Helen Smith" not "Mrs. John Smith"
- ✓ **Campaign Finance Activity**
State law requires an accounting of all money received or spent in the course of a political campaign. Candidates are required to submit regular campaign finance reports and to comply with the campaign finance laws and procedures. It is the responsibility of all those participating in political campaign financing in Massachusetts to become knowledgeable with the provisions of the campaign finance law and its regulations. Violations of the law carry serious penalties of fines, imprisonment, or both.

Your candidate packets include the following Campaign Finance Related materials:

- Campaign Finance Guide
- CPF M102 Campaign Finance Report & Instructions
- No Financial Activity Form CPF M102 – 0
- Common Errors Made Fact Sheet
- Public Employees and Campaigns Fact Sheet
- Memo regarding personal contributions

- ✓ **Political Signs**
It is recommended by the Building Commissioner for the Town of Freetown, that political signs only be placed on private property with the permission of the property owner and that they be out of the right of way, and not obstruct vehicle or pedestrian traffic. In accordance with Article 11.20D, Section 5b of the Town of Freetown's General & Zoning By-Laws, political signs must be removed within 7 days after the election.

MGL c.87 §9 allows for a fine of fifty dollars for affixing a notice, sign advertisement or other thing to a tree in a public way without obtaining written permission from the Tree Warden or Highway Department in the case of a state highway.

MGL c.266 §126 allows for not less than ten nor more than one hundred dollars, plus the cost of removing such defacement for posting banners, announcements, notices or signs on utility poles. These items can be safety hazards to vehicles and pedestrians as well as interfere with the proper operation of electric service.
- ✓ **Campaign Activities on Election Day**
On Election Day, at the polling place, political signs must be held by a person. No signs may be put into the ground, hung on fences or put on publicly owned property. No signs may be left unattended outside of the polling location.

No Electioneering/Campaigning, or any action intended to influence the action of a voter, **is allowed within 150 feet of the entrance door to the polling location**. Prohibited actions include holding any campaign signs; circulating or distributing campaign materials; wearing any campaign buttons or identifying signage; soliciting a person's vote for or against a candidate or question on the ballot; or distributing stickers. Extended time talking with Election workers or other residents in the polling location after you have voted may appear to be campaigning. Vehicles displaying campaign materials are also prohibited within the 150 feet of entrance. *950 CMR 52.03(22)(c)*



Town of Freetown

Key Dates to Remember for the 2024 Annual Town Election

NOMINATION PAPERS:

Thursday, February 8, 2024 at 5:00 PM.	Last Day and Hour to obtain Nomination Papers from Town Clerk's office	<i>MGL Ch.53 §9A</i>
Monday, February 12, 2024 at 5:00 PM.	Last Day and Hour to submit Nomination Papers to Board of Registrars (at the Office of the Town Clerk) for certification	<i>MGL Ch.53 §7</i>
Monday, February 26, 2024 at 5:00 PM.	Last Day for Registrars to file certified nomination paper with the Town Clerk	<i>MGL Ch.53 §10</i>
Wednesday, February 28, 2024 at 5:00 PM.	Last day and Hour to object to or withdraw Nomination Papers from the Town Clerk's office	<i>MGL Ch.53 §11</i>
Monday, April 1, 2024 12 Noon to 8:00 PM.	ANNUAL TOWN ELECTION at Freetown Elementary School, 43 Bullock Rd. Poll Locations: Precinct 1, Precinct 2 & Precinct 3	<i>FBL Art. 1.2</i>

SIGNATURES (for **all positions w/exception** of the Regional School District Committee):

a minimum **** 40 **** certified signatures with addresses of registered voters who live in Freetown are required. Obtaining additional signatures are recommended in case some of the signatures cannot be certified.

VOTER REGISTRATION: In-person: Town Clerk's Office from Monday-Thursday 8:00 AM to 4:00 PM, and on Fridays 8:00 AM to 12:00 PM. Online: www.voteinma.com

FINAL REGISTRATION: Town Clerk's office on **Friday, March 22, 2024**, from 8:00AM to 5:00PM. *MGL Ch.51 §26,28*

POSTING OF THE ELECTION WARRANT: Deadline **Monday, March 25, 2024**. *MGL Ch. 39 §10*

ABSENTEE BALLOTS: Applications must be submitted to the Town Clerk's Office *prior* to receiving a ballot. You may submit your ballot either in-person or via mail.

The deadline to apply & method is as follows:

Mail-in Absentee/Vote by Mail: **by 5:00 pm Monday, March 25, 2024**
In-person Absentee at Town Hall **by 5:00 pm Friday, March 29, 2024**

CAMPAIGNING: NO campaign literature, buttons, signs or other materials may be displayed within **150 feet** of the building entrance to a polling location. Any candidate, member of a ballot question committee, and/or their workers, are prohibited from remaining within 150 feet of a polling location for the purpose of greeting and/or promoting any candidacy or cause to be voted on at that election

POLITICAL SIGNS POLICY- See attached notice.

CAMPAIGN FINANCE REPORT FILING DEADLINES:

- ✓ Form CPF M102 **Due:** **Monday, March 25, 2024**
(Eight (8) days preceding election)
- ✓ Form CPF M102 **Due:** **Wednesday, May 1, 2024**
(Thirty (30) days after election)
- ✓ End of Year Report **Due:** **Monday, January 20, 2025**

If you do not receive any contributions, spend any money (including your own) or incur any liabilities in connection with your campaign, you may sign **FORM CPF M102-0** (available at the Town Clerks Office) for each reporting period in lieu of filing Form CPF M102.

All candidates must comply or be subject to notification to the Attorney General's Office.

****PLEASE BE ADVISED, ONCE A CANDIDATE IS ELECTED OR RE-ELECTED TO OFFICE THEY MUST BE SWORN IN PRIOR TO THEIR NEXT MEETING****



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SIGNATURES (for **Regional School District Committee**):

a minimum **** 50 **certified signatures with addresses** of registered voters who live in Freetown are required. Obtaining additional signatures are recommended in case some of the signatures cannot be certified.

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TOWN OF FREETOWN MASSACHUSETTS

Office of the Town Clerk

Cheryl C.A. Estrella, CMC
Town Clerk

Timothy J. McIntosh
Assistant Town Clerk

3 North Main Street
P.O. Box 438
Assonet, MA 02702
Phone: 508-644-2201, ext. 2
Fax: 508-644-9826
www.freetownma.gov

2024 Annual Town Election

Nomination Papers for the following town offices are available beginning

Tuesday, January 2nd at 9am

Position	Term	# Positions Available	Currently Held By
Selectman & Personnel Board Member	3 Years	1	Jared C. Zager
Assessor	3 Years	1	Paul G. Sadeck
Board of Health Member	3 Years	1	Robert P. Jose
Cemetery Commission	3 Years	1	Adrienne Levesque
Finance Committee	3 Years	2	Kent Wilkins Vacant
Finance Committee	2 Years (Unexpired)	1	Vacant
Highway Surveyor	3 Years	1	Charles J. Macomber
Housing Authority	5 Years	1	Ellen Lima
Library Trustees	3 Years	2	Irene Ashley Amy L. Sypher
Moderator	3 Years	1	Michael T. McCue
Planning Board	5 Years	1	James Frates
Planning Board	2 Years (Unexpired)	1	Vacant
Town Clerk	3 Years	1	Cheryl C.A. Estrella
Tree Warden	3 Years	1	Maurice W. DeMoranville, Sr.
Water & Sewer Commissioner	3 Years	1	Robert S. Parker
Regional School District Committee (Freetown)	3 Years	1	Jean C. Fox

Positions / Information Accurate as of December 13, 2023



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Town Clerk

Timothy J. McIntosh
Assistant Town Clerk

Statement of Candidacy for Municipal Office

Pursuant to the provisions of Massachusetts General Laws Chapter 53, § 9A, I hereby declare that I am requesting nomination papers to become a candidate in the **2024 Annual Town Election** for the office(s) designated below:

Name: _____

Residential Address: _____

E-Mail: _____ Phone: _____

Candidates Night/Media Contact

Please answer both questions.

I give permission to release my *email* address: YES NO

I give permission to release my *phone* number: YES NO

SIGN HERE

Signature: _____ **Date:** _____

For Office Use Only

Candidate has current-year census on file
 Yes No

Date Received

Office(s) Sought	Term	# Pages Issued
<input type="checkbox"/> Selectman & Personnel Board Member	3 Years	
<input type="checkbox"/> Assessor	3 Years	
<input type="checkbox"/> Board of Health Member	3 Years	
<input type="checkbox"/> Cemetery Commission	3 Years	
<input type="checkbox"/> Finance Committee	3 Years	
<input type="checkbox"/> Finance Committee	2 Years Unexpired	
<input type="checkbox"/> Highway Surveyor	3 Years	
<input type="checkbox"/> Housing Authority	5 Years	
<input type="checkbox"/> Library Trustees	3 Years	
<input type="checkbox"/> Moderator	3 Years	
<input type="checkbox"/> Planning Board	5 Years	
<input type="checkbox"/> Planning Board	2 Years Unexpired	
<input type="checkbox"/> Town Clerk	3 Years	
<input type="checkbox"/> Tree Warden	3 Years	
<input type="checkbox"/> Water & Sewer Commission	3 Years	
<input type="checkbox"/> Regional School District Committee (Freetown)	3 Years	



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Assistant Town Clerk

Objection or Withdrawal of Nomination

M.G.L. Ch. 55B, § 7: "Objections to certificates of nomination, nomination papers or withdrawals for town offices, or to petitions for local ballot questions, shall be filed with the Town Clerk within two working days of the last day fixed for filing such nomination papers, withdrawals, or petitions..."

Wednesday, February 28, 2024

Last day to object or withdraw

COMMONWEALTH OF MASSACHUSETTS
TOWN OF FREETOWN

Date: _____

The undersigned, _____, having been nominated as a
Name of Candidate – Please Print

candidate for the office of _____ in the
Name of Office – Please Print

Town of Freetown, hereby requests that his or her name be **withdrawn** from such nomination for the **Annual Town Election**, to be held on **Monday, April 1, 2024**.

Signature

Residential Address

COMMONWEALTH OF MASSACHUSETTS


Bristol, s.s.

Date: _____

Personally appeared before me the above named _____ and acknowledged the foregoing request by him or her signed to be their free act and deed.

Before me, _____
Notary Public

My Commission expires on _____



Campaign Finance Supplement

Cheryl C.A. Estrella, CMC
Town Clerk



TOWN OF FREETOWN
MASSACHUSETTS

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January 2, 2024

Dear Candidate,

Your first Campaign Finance Report will be due in this office on **March 25, 2024** (normally the 8th day preceding the election but moved to the next business day as the 8th day is a weekend day) and a second report will be due on **May 1, 2024** (the 30th day following the election).

If you have *any expenses or accepted any contributions*, you will need to complete a CPF-M102 Form (due **March 25th** and **May 1st**, as stated above). Even if you are paying for expenses yourself, you will still need to complete the CPF-M102 forms.

Enclosed is a CPF-M102 form and instructions for filing. Further information and forms can be obtained by visiting the Office of Campaign Finance (OCPF) website at www.ocpf.us (use the search bar to find the form or information you are seeking, or choose the “Forms & Education” dropdown, select “Guides, Forms & Publications”, and then the “Municipal Forms” tab). This information is also available at the Office of the Town Clerk if necessary. A tutorial for municipal candidates is available on the OCPF website, www.ocpf.us/. This website is a wonderful resource for all things campaign related. Please be sure to access their short videos! These fillable forms can also be found on the elections section of the Town’s website, www.freetownma.gov/elections.

If you are a candidate that will have no expenses, no contributions, etc., you are now able to sign only a CPF-M109 form, which is due on by **March 25, 2024**. A copy of the CPF-M109 form is enclosed. If your intentions change and you do have expenses, contributions, etc., you will be required to file the CPF-M102 forms as noted above.

Finally, also enclosed is a CPF-M101 Form – Statement of Organization. This form was previously required only for candidates that have committees, but a recent change in state regulations now requires it from *all candidates before any fundraising or before any campaign activity begins*.

Please contact me at 508-644-2201, ext. 2, if you have any questions regarding the above forms or due dates. Reports can be submitted to this office by hand, mail, fax or by email – contact information can be found at the top of the page. You can also contact the Massachusetts Office of the Campaign and Political Finance directly at 617-979-8300 or www.ocpf.us.

IMPORTANT: The campaign finance law mandates that a civil penalty of \$25 per day up to \$5,000 be assessed personally against the candidate for any report that is filed after the due date and upon referral to the OCPF.

Good luck with your candidacy for office!

Sincerely,

Cheryl C.A. Estrella, CMC
Town Clerk



Form CPF M101: STATEMENT OF ORGANIZATION CANDIDATE OR CANDIDATE'S COMMITTEE MUNICIPAL FORM

Commonwealth
of Massachusetts

Office of Campaign and Political Finance

File with: City / Town Clerk or Election Commission

NOTICE IS HEREBY GIVEN in accordance with the provisions of General Laws, Chapter 55, as amended, organization of a candidate or candidate's committee as follows:

CANDIDATE:	Full Name: _____
	Residential Address: _____
	City / State / Zip: _____
	E-Mail Address: _____ Phone #: _____
	Party Affiliation: _____ (If applicable)
OFFICE SOUGHT/PURPOSE:	
	Title: _____ District: _____
	<input type="checkbox"/> Candidate without committee (check if applicable). If checked, do not complete committee or officer sections: sign as candidate, date and file with clerk or local election official.

COMMITTEE:	Name of Committee: _____ (The name of the committee must include the candidate's last name)
	Committee Mailing Address: _____
	City / State / Zip: _____ Phone #: _____

OFFICERS:	
Chairperson: _____ Residential Address: _____ City / State / Zip: _____ Phone #: _____	Treasurer*: _____ Residential Address: _____ City / State / Zip: _____ Phone #: _____ Email: _____

*A public employee may not serve as treasurer of any political committee (see reverse).

Additional officers may be listed on page two.

Check applicable box before signing:

Candidate with committee: I hereby 1) consent to this filing; 2) understand that a candidate shall not consent to the organization of more than one account or committee on their behalf; 3) am subject to certain duties and liabilities under M.G.L. c. 55, including the timely filing of campaign finance reports and keeping detailed accounts and records of all campaign finance activity for a period of six years from the date of the relevant election; and 4) may not serve as treasurer of a political committee organized on my behalf.

Candidate without committee: I hereby 1) consent to this filing; 2) understand that a candidate shall not consent to the organization of more than one account or committee on their behalf; 3) acknowledge if I become a public employee I must organize a committee and may not serve as treasurer; and 4) am subject to certain duties and liabilities under M.G.L. c. 55 including the timely filing of campaign finance reports and keeping detailed accounts and records of all campaign finance activity for a period of six years from the date of the relevant election.

SIGNED UNDER THE PENALTIES OF PERJURY: _____ Date: _____
Candidate's signature

I hereby accept the office of Treasurer of the above-named committee. I affirm that I am not a public employee as defined by M.G.L. c. 55, s. 13. I understand that: 1) I am subject to certain duties and liabilities under M.G.L. c. 55, including the timely filing of campaign finance reports and keeping detailed accounts and records of all campaign finance activity for a period of six years from the date of the relevant election; 2) if after my acceptance of this office I become an appointed public employee, I must resign this position and notify OCPF of my resignation; and 3) a candidate may not serve as treasurer of the political committee organized on their behalf.

SIGNED UNDER THE PENALTIES OF PERJURY: _____ Date: _____
Treasurer's signature

I hereby accept the office of Chairperson of the above-named committee.

SIGNED UNDER THE PENALTIES OF PERJURY: _____ Date: _____
Chairperson's signature

ADDITIONAL OFFICERS:

Other Officer/Title: _____	Other Officer/Title: _____
Residential Address: _____	Residential Address: _____
City / State / Zip: _____	City / State / Zip: _____
Phone #: _____	Phone #: _____

DEFINITION OF A PUBLIC EMPLOYEE

M.G.L. Chapter 55, Section 13 states that a person who is employed for compensation by the Commonwealth or any county, city or town (other than an elected official) may not directly or indirectly solicit or receive political contributions. Such persons may not serve as treasurers of any political committee. If you are unsure of your status, please contact OCPF for further guidance.

SELECTED EXTRACTS FROM M.G.L C. 55

Section 1 defines a candidate's committee:

"Candidate's committee", the political committee organized on behalf of a candidate The term "candidate's committee" shall also apply to the campaign fund of a candidate who has not organized a political committee for the purpose of carrying out the election campaign of such candidate or who receives contributions or makes expenditures independently of said committee.

Section 2 requires candidates to keep certain records:

Every candidate shall keep detailed accounts of all contributions received by him, or by a person acting on his behalf and of all expenditures made by him, or by a person acting on his behalf. Said accounts may be kept by an agent duly authorized thereto, but the candidate shall be responsible for said accounts, which shall be kept separate and distinct from all other accounts and shall include contributions made by the candidate The candidate shall preserve all receipted bills and accounts relative to all contributions received, expenditures made and any other campaign finance activity. ...The candidate shall preserve said receipted bills and accounts for six years from the date of the relevant election....

Section 3 requires the director to:

"assess a civil penalty for any [late filed] report ... of twenty-five dollars (\$25) per day [up to \$5,000 per report]. In the case of failure to file by a candidate or a candidate's committee, the civil penalty shall be assessed against the candidate

Section 5 outlines statements of organization of political committees:

Each political committee shall organize by filing with the director or, if organized for the purpose of a city or town election only, with the city or town clerk, a statement of organization.

The statement of organization shall include: (1) the full name of the political committee, which, if organized on behalf of a candidate, shall include the name of the candidate in said name; (2) the address of the political committee; (3) a statement of the purpose for which the political committee is organized (4) the name and residential address of the chairman and the treasurer; (5) the name, residential address, and position of other principal officers, including officers and members of the finance committee, if any, and; (6) the name and address, if known, and party affiliation of each candidate the political committee is supporting; provided, however, that if a candidate is nominated without reference to a political party, the name of his political party shall not be required

Any change in information previously submitted in a statement of organization shall be reported to the director, or if organized for the purpose of a city or town election only, to the city or town clerk, within ten days following the change.

Each political committee shall have a treasurer who shall qualify for his office by filing a written acceptance thereof with the director, or if organized for the purpose of a city or town election only, with the city or town clerk. Said treasurer shall remain subject to all the duties and liabilities imposed by this chapter until his written resignation of the office is received or his successor's written acceptance is filed as aforesaid. No person acting under the authority of, or on behalf of, any political committee shall receive any money or anything of value, or expend or disburse the same, or incur expenses while it has no treasurer qualified as aforesaid

Each treasurer of a political committee shall keep and preserve detailed accounts, vouchers and receipts as prescribed for a candidate by the provisions of section two. Each treasurer of a political committee shall keep said records for a period of six years following the date of the relevant election

No expenditure shall be made for, or on behalf of, a political committee without the authorization of the chairman or treasurer, or their designated agents

All funds of a political committee shall be kept separate from any personal funds of officers, members or associates of such committee

IMPORTANT: M.G.L. c. 55, s. 5 requires that any changes in the information provided on this form shall be filed within ten (10) days of said change. Further information can be obtained from OCPF by phone at (617) 979-8300, via e-mail at ocpf@mass.gov or on the web at www.ocpf.us



Form CPF M 102: Campaign Finance Report Municipal Form

Office of Campaign and Political Finance

Commonwealth
of Massachusetts

File with: City or Town Clerk or Election Commission

Fill in Reporting Period dates: Beginning Date: _____ Ending Date: _____

Type of Report: (Check one)
 8th day preceding preliminary 8th day preceding election 30 day after election year-end report dissolution

Candidate Full Name (if applicable)
Office Sought and District
Residential Address
E-mail: _____
Phone #: _____

Committee Name
Name of Committee Treasurer
Committee Mailing Address
E-mail: _____
Phone #: _____

SUMMARY BALANCE INFORMATION:

Line 1: Ending Balance from previous report	<input type="text"/>
Line 2: Total receipts this period (page 3, line 12)	<input type="text"/>
Line 3: Subtotal (line 1 plus line 2)	<input type="text"/>
Line 4: Total expenditures this period (page 5, line 15)	<input type="text"/>
Line 5: Ending Balance (line 3 minus line 4)	<input type="text"/>
Line 6: Total in-kind contributions this period (page 6, line 18)	<input type="text"/>
Line 7: Total (all) outstanding liabilities (page 7, line 19)	<input type="text"/>
Line 8: Total out-of-pocket expenses this period (page 8, line 22)	<input type="text"/>
Line 9: Name of bank(s) used:	<input type="text"/>

Affidavit of Committee Treasurer:
I certify that I have examined this report including attached schedules and it is, to the best of my knowledge and belief, a true and complete statement of all campaign finance activity, including all contributions, loans, receipts, expenditures, disbursements, in-kind contributions and liabilities for this reporting period and represents the campaign finance activity of all persons acting under the authority or on behalf of this committee in accordance with the requirements of M.G.L. c. 55.
Signed under the penalties of perjury: _____ (Treasurer's signature) Date: _____

FOR CANDIDATE FILINGS ONLY: Affidavit of Candidate: (check 1 box only)

Candidate with Committee
I certify that I have examined this report including attached schedules and it is, to the best of my knowledge and belief, a true and complete statement of all campaign finance activity, of all persons acting under the authority or on behalf of this committee in accordance with the requirements of M.G.L. c. 55. I have not received any contributions, incurred any liabilities nor made any expenditures on my behalf during this reporting period that are not otherwise disclosed in this report.

Candidate without Committee
I certify that I have examined this report including attached schedules and it is, to the best of my knowledge and belief, a true and complete statement of all campaign finance activity, including contributions, loans, receipts, expenditures, disbursements, in-kind contributions and liabilities for this reporting period and represents the campaign finance activity of all persons acting under the authority or on behalf of this candidate in accordance with the requirements of M.G.L. c. 55.
Signed under the penalties of perjury: _____ (Candidate's signature) Date: _____

INSTRUCTIONS FOR COMPLETING CAMPAIGN FINANCE REPORTS FOR USE WITH FORM CPF M 102

PAGE ONE:

(1) REPORT DATES

A campaign finance report must indicate the beginning date and ending date of the report period. Dates must be completed for the report to be accepted. Also, check off reason for filing report (i.e.. 8th day preceding election).

(2) CANDIDATE/COMMITTEE INFORMATION

Fill in the appropriate information in the candidate and/or the committee boxes.

(3) SUMMARY ACTIVITY (Lines 1-7)

- (a) Lines 1-5 of your campaign finance report are on a cash basis reporting system.
- (b) Lines 1-7 must be completed for a report to be accepted. They reflect ending balance from previous report, (line 1) total receipts for the reporting period, (line 2) and total expenditures for the reporting period (line 4) for the period as well as total money available as of the last day of the reporting period (line 5).
- (c) ENDING BALANCE, line 5, should be:
 - line 1 (beginning balance)
 - line 2 (total receipts this report)
 - line 3 (line 1 + line 2)
 - line 4 (total expenditures this report)
 - line 5 (line 3 - line 4) cash available
- (c) Line 5 can NOT be a negative figure since this is a cash reporting system (unless the campaign has an overdrawn checking account).
- (d) The candidate and/or treasurer should reconcile the most recent bank statement with the campaign finance report to ensure the accuracy of the reported balances.
- (e) Total in-kind contributions (line 6) are carried forward from Schedule C.
- (f) Total liabilities (line 7) are carried forward from Schedule D.
- (g) Total liabilities (line 7) must be cumulative, and reflect all debts of the committee outstanding as of the last day of the reporting period, not just debts incurred during the current period.

(4) SIGNATURES

- (a) Reports will not be accepted unless they contain original signatures of the treasurer (if a committee report) and the candidate in ink.
- (b) A candidate should always sign the box on the bottom of the form and check off the affidavit which is applicable to his/her situation. If the candidate has a committee and no expenditures were made independent of the committee by the candidate he/she should check off the top affidavit. If the candidate has made expenditures independent of the committee, the candidate must file a separate report disclosing the independent activity and check off the bottom affidavit on the report of the candidate's independent campaign activity.
- (c) For committee reports the treasurer must sign the affidavit for the committee treasurer in the box just above the box for the candidate.
- (d) If the candidate does not have a committee, he/she files a candidates report, checks off the bottom affidavit, and signs the report.

PAGE TWO:

SCHEDULE A (RECEIPTS)

- (1) The report must itemize, alphabetically, the names and residential addresses of any receipt in excess of \$50 for the reporting period. These are totaled on line 9. Receipts of \$50 or less should be totaled from the committee's records, and disclosed in the aggregate on line 10. Lines 9 and 10 should be added, and the total shown on line 11. Total receipts (line 11) should be carried forward to page one, line 2.
- (2) If an individual's contribution is \$ 200 or more (or his contributions total \$ 200 or more in a calendar year), you must also report the contributor's employer and occupation. If you have sent the required letter requesting missing emp./occ. information and have not received a response at the time of filing indicate "letter sent" and the date of the letter.
- (3) A loan should be reported as a receipt under the name of the individual who is making the loan; you should indicate that it is a loan by writing "loan" in the space next to the amount.
- (4) Contributions from the candidate, including loans, must be reported as receipts.
- (5) Political Action Committee (PAC) contributions must be reported under the name of the PAC

(including CPF ID#) and not the name of the individual who signed or presented the check. PACs must be registered under M.G.L. c. 55 to contribute to Massachusetts candidates. (Registered PACs and their CPF ID numbers are available from OCPF.)

(6) Contributions from trusts, foundations, associations or other organizations must be disclosed under the organization's name along with the names and addresses of its principal officers.

(7) Contributions must be reported as of the date received, not the date they were deposited.

(8) Individual contributions made through non-incorporated businesses should be reported as an individual "doing business as," i.e. John Smith D/B/A Smith's Market. Committees should verify, prior to accepting such contributions, that such business is not incorporated.

(9) Schedule A must reflect all receipts of money during the reporting period including refunds from vendors or others and interest earnings.

PAGE THREE:

SCHEDULE B (EXPENDITURES)

(1) The report must itemize, alphabetically, all expenditures of more than \$50 for the reporting period. These are totaled on line 12. Expenditures of \$50 or less should be totaled from the committee's records, and disclosed in the aggregate line 13. Lines 12 and 13 should be aggregated, and the total shown on line 14. Total expenditures (line 14) should be carried forward to page one, line 4.

(2) For individuals who are reimbursed more than \$50 for expenditures made on behalf of the committee, an itemization of reimbursements, form R 1, must be completed to disclose the name, address, purpose and amount for each expenditure made on the committee's behalf.

(3) The stated purpose of each expenditure listed should convey detailed information about the political purpose of the expenditure.

(4) Schedule B must reflect all payments made by the committee including bank service charges and contributions to other committees, even if returned.

(5) If the committee holds a credit card, it must file form CPF M9 and copies of the credit card statements disclosing committee credit card activity. (NB. The credit card number is not required) If reimbursing an individual for charges made on a personal credit card, make payment to the individual and file form R 1 itemizing the reimbursement.

PAGE FOUR:

SCHEDULE C (IN-KIND CONTRIBUTIONS)

(1) The committee must report contributors who have contributed things of value (in-kind contributions) that exceed \$50 by indicating their name, address and a description of what was contributed. In-kind contributions of \$50 or less are aggregated on line 20. If the contribution is \$200 or more, the occupation and employer of the contributor is also required.

(2) Things of value that are NOT included as in-kind contributions are personal services, ordinary hospitality and incidental expenses in rendering a personal service.

SCHEDULE D (LIABILITIES)

(1) Schedule D is a cumulative schedule of ALL debts as of the last day of the reporting period. It includes:

- (a) Any unpaid bills that the committee has on hand.
- (b) All obligations for goods or services that have been provided to the committee that remain unpaid at the time of the report.
- (c) All outstanding loans from a candidate or others.

(2) Debts should be carried from one report to the next unless such debt has been paid or forgiven during the reporting period. If debt is forgiven, it should be listed as an in-kind contribution on Schedule C and a copy of the letter of forgiveness should be filed with the report.

FORMAT FOR COMPUTER GENERATED REPORTS

All computer generated report formats must be approved by the local election official prior to submission (other than OCPF's reporting software).

If you have any questions, or require further information, please call your election commission, city or town clerk, or the Office of Campaign and Political Finance.

9/99



Commonwealth
of Massachusetts

**Form CPF M109:
Statement of Municipal Candidate
Not Raising or Expending Campaign Funds
Office of Campaign and Political Finance**

File with: Local Election Official (City or Town Clerk)

Candidate's Name:	_____
Office Sought:	_____
Residential Address:	_____
City / State / Zip:	_____
E-Mail Address:	_____
Phone Number:	_____

I hereby certify that I have not opened a campaign bank account for campaign funds because I do not intend to accept contributions or in-kind contributions, make expenditures, **including expenditures of my own funds**, or incur liabilities for any campaign-related purpose, **nor do I currently have any outstanding liabilities for prior campaign-related activity**. I submit the following as my campaign report for all bank reporting periods in this calendar year as provided for in Chapter 55 of the Massachusetts General Laws:

- | | |
|--|------|
| 1. Ending balance from previous report | ZERO |
| 2. Total receipts for reporting period | ZERO |
| 3. Subtotal | ZERO |
| 4. Total Expenditures for reporting period | ZERO |
| 5. Ending balance | ZERO |

After filing this statement, **if I decide to raise, accept, or expend funds, or incur liabilities, for a campaign-related purpose, I will immediately notify my local election official in writing**, and will file periodic campaign finance reports according to the statutory filing schedule.

Until such notice is on file with the local election official, I certify that the above Zero report will be in effect for each reporting period, **in the calendar year in which it is filed**, required by Chapter 55 of the Massachusetts General Laws.

This form is valid through December 31 of the year in which it was signed.

SIGNED UNDER THE PENALTIES OF PERJURY:

Candidate's signature:

Date:

INSTRUCTIONS FOR COMPLETING FORM CPF M109

This form is filed by a candidate who only files with their local election official, if:

1. The candidate has not received any contributions;
2. The candidate has not made any expenditures; including with their own funds or personal credit cards;
3. The candidate has not incurred any obligations (liabilities);
4. The candidate does not have a campaign fund in existence; and
5. ~~At~~ The candidate does not have a political committee.

Municipal candidates who file with OCPF, including mayoral candidates, and city council candidates in cities with populations of more than 65,000, are not eligible to submit this form to their local election official.

For assistance, please contact the Office of Campaign and Political Finance at (617) 979-8300 or by e-mail at ocpf@mass.gov



THE COMMONWEALTH OF MASSACHUSETTS
OFFICE OF CAMPAIGN & POLITICAL FINANCE

ONE ASHBURTON PLACE, ROOM 411
BOSTON, MASSACHUSETTS 02108

MICHAEL J. SULLIVAN
DIRECTOR

TEL: (617) 727-8352
(800) 462-OCPF
FAX: (617) 727-6549

COMMON ERRORS MADE WHEN COMPLETING CAMPAIGN FINANCE REPORTS

Some errors tend to appear in campaign finance disclosure reports on a regular basis. OCPF has prepared this guide to help local candidates avoid those mistakes on their M-102 reports.

COVER PAGE

- **Correct dates:** Check with your local city or town clerk or election commission for the correct filing dates and periods covered, which depend on the dates of local elections.
- **Beginning balances:** Line 1 must be the same as Line 5 from your last report.
- **Negative balances:** Lines 1-5 are on a cash based system. Negative balances are possible only if your account is overdrawn.
- **Math errors:** If you are not using OCPF's software, please double check your calculations.
- **Signatures:** Original signatures of the candidate and, in the case of a committee, the treasurer are required.

SCHEDULE A

- **Date Received:** List the date a contribution was actually received by the committee, not the date of the check or the date it was deposited into the committee's bank account.
- **Contributor information:** Avoid using initials instead of first names. Provide residential addresses.
- **Interest earned:** Report as a receipt. You must account for all money that enters the account, including refunds and any funds provided by the candidate.
- **Occupation/Employer:** If information is not provided by the contributor, you must ask for it in writing within 45 days of receipt. Your report should indicate "Letter Sent" and the date of the letter.
- **Cash/Money Orders:** Contributions by cash and money order are limited to \$50 or less.

SCHEDULE B

- **Purpose of Expenditures:** Be specific. For example, list "thank you dinner for supporters," not "meals".
- **Candidate expenditures:** Include any personal funds spent by the candidate on behalf of the committee. Failing to include the candidate's own contributions and expenditures could result in a negative balance.
- **Reimbursements:** List the purpose of any reimbursement in addition to the actual recipient. If necessary, use the R-1 form to provide complete vendor/purpose/cost disclosure.

SCHEDULE D

- **Liabilities:** Report all outstanding liabilities, regardless of when incurred, that are still outstanding. If you have not received a bill, report amount as "to be determined."

PLEASE FILE ON TIME. Filing on time ensures the required disclosure and also avoids the \$25 per day penalty that may be imposed by law. If you have any questions as you complete your report, we encourage you to contact your local election official or OCPF for assistance.

03/10



The Commonwealth of Massachusetts
OFFICE OF CAMPAIGN AND POLITICAL FINANCE
PUBLIC EMPLOYEES AND CAMPAIGNS

MGL Chapter 55, the campaign finance law, regulates political activity by public employees and the use of public buildings and resources in campaigns. Public employees who take part in political campaigns and the candidates and committees they support should be aware of these sections of the law.

SECTION 13: Public Employees

No person employed for compensation by agencies of the Commonwealth, its cities, towns and counties, other than an elected official, may directly or indirectly solicit or receive a contribution or anything of value for any political purpose (e.g., candidates, parties, PACs, ballot question committees).

A public employee may not:

- * sell tickets to a political fundraiser or other wise solicit or collect political contributions in any manner, including in person, by phone, by e-mail, by social media or by conventional mail.
- * sponsor or host a political fundraising event.
- * allow his or her name to be used in a fundraising letter, advertisement, social media post, phone call or e-mail.
- * help identify people to be targeted for political fundraising.
- * serve as treasurer of a political committee.

A public employee may:

- * contribute to candidates and attend fundraisers.
- * run for office (an employee must organize a campaign committee if he or she plans to raise money).
- * work for campaigns and committees in a non-fundraising capacity, such as holding signs, stuffing envelopes, hosting coffees or other meetings, or being a member of a committee.

SECTION 14: Government Buildings

Soliciting or receiving campaign contributions in a government building is prohibited. Examples include city and town halls, public schools, libraries, police and fire stations and public works buildings.

No one (not just public employees) may:

- * sell ticket to a fundraiser or otherwise solicit or collect political contributions in a public building.
- * send a solicitation into a government building, such as by phone, mail or e-mail.
- * use a public building as the site of a fundraiser, the return address for contributions or the contact phone number for buying tickets to a fundraiser.
- * post in a public building any advertisement for a fundraiser.

Use of Public Resources

Public resources (government vehicles, office equipment, and the paid time of public employees) may not be used for political campaign purposes, such as the election of a candidate or the passage or defeat of a ballot question. For example, a public employee may not, during his or her work day, render campaign service to a candidate or ballot question committee or use office postage or equipment to distribute campaign material.

****CANDIDATES WHO FILE WITH CITIES OR TOWNS****

Are you spending personal funds on your campaign?

Here's how to disclose it on your campaign finance report



Municipal candidates* who file locally in the non-depository system often make campaign expenditures using their personal funds. When doing so, they are required to disclose the expenditures and contributions on their campaign finance reports (CPF M102 form).

Step One: Report the amount spent as a contribution from the candidate to the campaign on Schedule A, even though the money was paid directly to a vendor. If you anticipate being paid back by the committee, write "loan" next to the candidate's name.

Step Two: Record the amount as an expenditure, listing the actual vendor in the "To Whom Paid" column on Schedule B (expenditures) with the date, purpose, address and amount. Listing the expenditure balances the account.

Step Three: If a candidate anticipates being paid back by the campaign, the contribution information should be listed in the liabilities section of the campaign finance report (Schedule D). Liabilities to a candidate can remain for as long as the committee is open, and may be paid back or forgiven at a future date.

Example: Candidate X needs to buy \$1,000 worth of lawn signs but does not have that balance in his campaign account. He uses his personal funds. He will disclose the activity by reporting a \$1,000 contribution to the campaign from himself on the receipts schedule and a \$1,000 expenditure to the lawn sign company on the expenditures schedule. If it is considered a loan to the campaign, he will also list the \$1,000 amount as a loan on the liabilities schedule.

Exception

If a candidate is reimbursed for out-of-pocket expenditures before the end of the campaign reporting period, he or she should *not follow the steps above*. The campaign finance report would disclose the activity as a reimbursement to the candidate with a corresponding reimbursement form (CPF R1).

*Includes all municipal candidates in cities and towns who file campaign finance reports with their municipal clerks or local election officials.





THE COMMONWEALTH OF MASSACHUSETTS
OFFICE OF CAMPAIGN & POLITICAL FINANCE

ONE ASHBURTON PLACE, ROOM 411
BOSTON, MASSACHUSETTS 02108

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(800) 462 - OCPF
EMAIL : OCPF@CPF.STATE.MA.US

M-98-03

Revised: May 28, 2020

MEMORANDUM

TO: Interested Persons
FROM: OCPF
SUBJECT: Use of Candidate's Personal Funds for Campaign

This memorandum reviews questions that candidates ask about making contributions to, and expenditures from, their campaigns using their own personal funds. Candidates may contribute their own personal funds to their campaign and use those funds for campaign purposes in any amount. Certain candidates are limited, however, in how much they may loan to their campaign. Of course, like any contribution, candidate contributions may not be commingled with personal or business accounts.

I. Contributions and Expenditures by Candidates

1. Is there a limit to how much I can contribute to my campaign?

No. You may contribute to your campaign without limitation.¹ In contrast, individual contributions from others are limited to \$1,000 per calendar year. Contributions from lobbyists, however, are limited to \$200 in a calendar year.

2. If I use my own money for my campaign, does this have to be disclosed?

Yes, candidates who file with OCPF generally file in the depository system.² This means that they must generally deposit funds into the committee account rather than make expenditures directly, to ensure that expenditures are disclosed by the depository bank.

Municipal candidates who do not file using the depository system disclose out-of-pocket expenditures by reporting (1) a receipt in Schedule A; (2) an expenditure in Schedule B; and, if the candidate intends to be repaid, (3) a liability in Schedule D.

¹ The spouse of a candidate may also contribute (or loan, subject to the restrictions on candidate loans described in Section II, below) without limitation.

² Depository candidates and committees include state, county, and mayoral candidate committees, PACs that file reports with OCPF (other than independent expenditure PACs), state party committees, and committees organized on behalf of candidates for city council in cities with a population of 65,000 or more (currently Boston, Cambridge, Lowell, Springfield, Worcester, New Bedford, Brockton, Quincy, Lynn, Fall River, Newton, Lawrence, Somerville, and Framingham). See M.G.L. c. 55, § 19. The only candidates that file with OCPF who are not in the depository system are candidates for Barnstable Assembly of Delegates.

3. If I am paying for campaign expenses, do I need to organize a political committee?

No. If you are employed for compensation by the commonwealth or any of its subdivisions, however, you would be prohibited from political fundraising. *See* M.G.L. c. 55, § 13. If you are a public employee subject to Section 13, you must (unless you use only your own funds for your campaign) organize a political committee to solicit and receive contributions on your behalf.

II. Loans by Candidates to the Candidate’s Campaign

A candidate may make a contribution in the form of a loan to his or her campaign. If a candidate loans funds to the campaign, the campaign may subsequently repay the candidate. The amount of a candidate loan, however, is restricted for some candidates. It is important for candidates and treasurers to remember that a loan is also considered a contribution.³

1. Do I have to report loans I make to my campaign, and if so, how?

Candidates who file with OCPF disclose a loan to the committee on a deposit report and select “candidate loan” from the drop-down menu when reporting the deposit. The loan will be listed as a liability of the campaign on the Liabilities schedule of the year-end campaign finance report, which is e-filed each year on January 20.⁴

Local candidates who do not file with OCPF report a loan as a contribution on Schedule A of the campaign finance report, Form M102. The report should note clearly on Schedule A that the contribution was made as a loan to the campaign. In addition, the loan should be reported as a liability of the campaign on Schedule D of the report. *See* Example.

Example: Form CPF M102 (Local Candidate Disclosure of Candidate Loan)

Schedule A: Receipts

Date Received	Name and Residential Address (alphabetical listing required)	Amount	Occupation & Employer (for contributions of \$200 or more)
9/4/20	Candice Candidate (loan to committee) 101 Memory Lane Anytown, MA 01234	\$2,500	Computer Programmer ISR Company

³ The campaign finance law defines “contribution” to include all loans, except bank loans made in the ordinary course of business. *See* M.G.L. c. 55, §1. Although loans from candidates to their committees are therefore “contributions,” not all contributions are loans. For a contribution to be considered a loan, it must be disclosed as such on campaign finance reports filed by the candidate.

⁴ Candidates for the Barnstable Assembly of Delegates, although they file their campaign finance reports with OCPF, are not in the depository system. Therefore, they disclose the receipt and repayments of candidate loans in the same manner as local candidates, as described below, although electronically via OCPF’s web-based reporting software.

Schedule D: Liabilities

Date Incurred	To Whom Due	Address	Purpose	Amount
9/4/20	Candice Candidate	101 Memory Lane Anytown, MA 01234	Candidate Loan	\$2,500

2. Is there any limit to the amount which I may loan my campaign?

Yes, for some offices. The amount a candidate may loan his or her campaign per election⁵ is limited for certain candidates as follows:

Governor	\$200,000	Lieutenant Governor	\$200,000
Secretary of State	\$150,000	Treasurer	\$150,000
Auditor	\$150,000	Attorney General	\$150,000
State Senator	\$50,000	State Representative	\$30,000

All other candidates, including candidates running for county or municipal office, may make loans to their campaigns without limitation. Since loans are treated as contributions, however, loans from other individuals (except the candidate’s spouse) are limited to \$1,000 per calendar year (\$200 for lobbyists).

3. How do I report repayment of a loan?

Candidates who file with OCPF are issued a check from their committee with a notation in the “memo” line of the check stating “candidate loan repayment.” The candidate then selects “Candidate Loan Repayment” on the Liabilities schedule of the year-end report.

Local candidates who do not file with OCPF report the loan repayment as an expenditure on Schedule B and also reduce the liability on Schedule D, of the report covering the period in which the repayment takes place.

4. What if I decide to dissolve my committee and the committee has never repaid the loan to me?

If you do not have funds remaining in your campaign account, or if you use remaining funds for other campaign purposes, you may “forgive” the loan obligation by selecting “Loan Forgiveness” on the liability schedule of the dissolution report. When “Loan Forgiveness” is selected, the R7 software automatically includes the amount forgiven as an in-kind contribution.

⁵ The phrase “per election” includes each regular or special primary or general election. For example, a candidate for state senate may loan his or her committee \$50,000 between the previous November election and the following September primary and another \$50,000 between the September primary and the following November election, for a total of \$100,000.

M-98-03

Revised: May 28, 2020

Page 4

Municipal candidates who file locally disclose an in-kind contribution on Schedule C, and a loan forgiveness on Schedule D.

For further information and guidance regarding this memorandum, please contact OCPF at (617) 979-8300.



TOWN OF FREETOWN
MASSACHUSETTS

Office of the Town Clerk

Cheryl C.A. Estrella, CMC
Town Clerk

Timothy J. McIntosh
Assistant Town Clerk

3 North Main Street
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Assonet, MA 02702
Phone: 508-644-2201, ext. 2
Fax: 508-644-9826
www.freetownma.gov

Political Sign Policy

Please take notice that signs cannot be erected on Town or State property. They must be placed only on private property. Signs should be placed approximately eight (8) feet back from road asphalt, as that is the edge of public/private property in most cases.

- Please do not erect signs sooner than 30 days before election. *(Article 11.20D, Section 5b)*
- Signs should not exceed 6 square feet in area and not exceed 40 inches in length or 36 inches in width. *(Article 11.20D, Section 5b, Subsection C)*
- Please remove signs within 7 days following an election. *(Article 11.20D, Section 5b)*

If signs are placed in the roadway or on public property they could be removed. Your anticipated cooperation is appreciated.

Thank you.