

2022 UAW International Officer Election
Campaign Financial Disclosure Form
[Election Rules, Section 8-8]

Section 8 of the Election Rules governs campaign contributions and political donations related to and in connection with the 2022 UAW International Officer Election (the “2022 Election” or “Election”). The Rules provide detailed guidance regarding monthly campaign contribution and political expenditure disclosure requirements. As set forth in Section 8-8 of the Rules, a Candidate, Slate of Candidates, or Covered Party must file with the Monitor monthly campaign contribution and political expenditure disclosure statements for each Campaign Account. For a Candidate or Slate of Candidates, these forms are due to the Monitor (or, by designation, the Election Auditor) (1) within two weeks of the date the Candidate submits the Candidate Declaration and seeks official vetting by the Monitor pursuant to Section 3-2 of the Rules; and (2) by 5 p.m. ET on the first Friday of the month as set forth below. The Candidate, Slate of Candidates, or Covered Party **MUST** submit this form for each Campaign Account to attest to monthly campaign contribution and political expenditure requirements. Please read the Explanation and Instructions below. Then, turn to Page 4 to complete the Campaign Financial Disclosure Form.

EXPLANATION AND INSTRUCTIONS

Explanation

As set forth in Section 8 of the Official Rules for the 2022 International Officer Election of the UAW (the “Rules”), a Candidate, Slate of Candidates, or Covered Party must file with the Monitor monthly campaign contribution and political expenditure disclosure statements for each Campaign Account. For a Candidate or Slate of Candidates, these forms are due to the Monitor (or, by designation, the Election Auditor) (1) within two weeks of the date the Candidate submits the Candidate Declaration and seeks official vetting by the Monitor pursuant to Section 3-2 of the Election Rules; and (2) by 5 p.m. ET on the first Friday of the month as follows:

- June 3, 2022
- July 1, 2022
- August 5, 2022
- September 2, 2022
- October 7, 2022
- November 4, 2022
- December 2, 2022

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Additional disclosure dates may be required in the event of a Run-Off Election. For a Covered Party, these forms are due to the Election Auditor no later than 5 p.m. ET on the above-referenced dates.

Each Candidate or Slate of Candidates shall have the right to inspect the campaign contribution and political expenditure disclosure statements of other Candidates, Slates of Candidates, and Covered Parties. The Monitor reserves the right to redact the personal identifying information on the forms made available for inspection.

A Candidate, Slate of Candidates, or Covered Party must account for any contribution they receive, raise, donate, or expend in connection with the 2022 Election, regardless of size, and collect and preserve the same information required for disclosure as described below, and must provide it to the Monitor or Election Auditor immediately upon the Monitor's request (*see also* Section 8-7 of the Election Rules).

The disclosure requirements associated with the Campaign Financial Disclosure Form also apply to any contributions received, expenditures incurred, or services obtained by a Candidate, Slate of Candidates, or Covered Party to pay fees for legal and accounting services performed to ensure compliance with applicable election laws, rules, or other requirements, or in securing, defending, or clarifying the legal rights of Candidates, Slates of Candidates, or Covered Parties as described in Section 8-5 of the Election Rules.

Every Candidate, Slate of Candidates, or Covered Party is required to give to the Monitor and Election Auditor formal written consent to obtain all information concerning the depository account(s) (Campaign Account(s)) in which they have placed any contributions. The Monitor's and Election Auditor's access shall extend, but is not limited, to all financial statements, cancelled checks, and copies of deposited items.

As soon as practicable, every Candidate, Slate of Candidates, and Covered Party should review the Election Rules, including the campaign finance requirements (Section 8) in full. The Rules are posted on the Monitor's website, www.uawmonitor.com/elections, along with Election FAQs and answers thereto. The Monitor will also hold a webcast to discuss and answer questions regarding campaign finance requirements for Candidates and other interested parties in the coming weeks. The webcast will be recorded and posted on the Monitor's website. Please reach out to the Monitor through the Election Hotline at any time for assistance at UAWMonitor-Election@jenner.com or 212-303-2529.

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Instructions

Using the below Campaign Financial Disclosure Form, every Candidate, Slate of Candidates, or Covered Party must disclose the following information:

- **Account information:** for the Campaign Account, the following information: the name and address of the bank or other depository institution at which the account is maintained; the name of the account signatories; the account numbers; and the date the account was opened and, if applicable, closed;
- **Account balances:** the cash balance of the Campaign Account at the beginning and end of the reporting period, the total amount of contributions received, the total amount of expenditures incurred, and the total amount of goods and services obtained;
- **Contributions from individuals:** for every individual who has contributed \$100 or more—either in one or more contributions whose total value equals or exceeds \$100—the following information: the individual’s name, address, and Local Union affiliation (if a UAW member); the date(s) and amount(s) of the contribution(s); and the manner in which the contribution was made (check, cash, money order, or some other means) or, if the contribution was of material or equipment, a description of the contribution and the value attributed to it. Candidates, Slates of Candidates, and Covered Parties may also report contributions under \$100 if they so choose;
- **Contributions from entities:** if an entity not otherwise prohibited by the Election Rules has contributed \$100 or more—either in one or more contributions whose total value equals or exceeds \$100—the following information: the name, address, and Local Union affiliation (if a UAW member) of an official representative of the entity; the date(s) and amount(s) of the contribution(s); and the manner in which the contribution was made (check, cash, money order, or some other means) or, if the contribution was of material or equipment, a description of the contribution and the value attributed to it. Candidates, Slates of Candidates, and Covered Parties may also report contributions under \$100 if they so choose;
 - **In-kind donations or discounted goods or services:** where a campaign (or Covered Party, in connection with the 2022 Election) receives anything of value, or obtains or uses a good or service, and the thing, good, or service was provided at other than fair market value, the difference between the fair market value and the amount actually paid is a **contribution**. Such a contribution is permitted only to the extent provided for in the Rules and under federal labor law and, if permitted, must be disclosed in accordance with the Election Rules; and

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- **Expenditures incurred or goods or services obtained:** for any expenditure incurred of \$100 or more or for anything of value, good, or service obtained of \$100 or more in value, the following information: the name and address of the person or business providing the good or service; the amount of the expenditure incurred or the value of the good or service obtained; the purpose of the expenditure incurred or the good or service obtained; the date the expenditure was incurred or the good or service received; and the manner in which the expenditure was made (check, electronic transfer, or if necessary, credit card).

The Campaign Financial Disclosure Form must be signed by either the Candidate or a Credentialed Representative of the Candidate (as defined in Section 4-2 of the Election Rules); the Treasurer of the Slate or a Credentialed Representative of the Slate; or the Treasurer or other representative of the Covered Party.

The Campaign Financial Disclosure Form must be filled out completely **through electronic means** (i.e., please use the fillable PDF function). Any and all bank statements for the reporting period must also be uploaded with this form. To do so, click on the button on the first page of the form that states, “Click to Attach Bank Statement for Reporting Period” and attach the appropriate bank statement(s). Please also **electronically type** the declarant’s signature (electronic is equivalent to handwritten). The Campaign Financial Disclosure Form must then be submitted to the Monitor via email at UAWMonitor-Election@jenner.com. **If it is not possible to complete the Campaign Financial Disclosure Form and/or attach the bank statements via electronic means and/or to submit it to the Monitor via email, please reach out to the Election Hotline for technical assistance at UAWMonitor-Election@jenner.com or 212-303-2529.**

The Monitor will hold a webcast to discuss and answer questions regarding campaign finance requirements for Candidates and other interested parties in the coming weeks. The webcast will be recorded and posted on the Monitor’s website. Please reach out to the Monitor through the Election Hotline at any time for assistance, including any technical questions regarding how to complete the Campaign Financial Disclosure Form, at UAWMonitor-Election@jenner.com or 212-303-2529.

Please turn to the following page for the Campaign Financial Disclosure Form.

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A. REPORTING PARTY INFORMATION

Name of Candidate, Slate of Candidates, or Covered Party: _____

This report covers the period beginning _____ and ending _____.
Month/Day/Year Month/Day/Year

B. BANK ACCOUNT INFORMATION

Bank Account For: (select one, one form must be completed for each account purpose)

GENERAL CAMPAIGN CONTRIBUTIONS (PRIMARY ACCOUNT)

LEGAL AND ACCOUNTING SERVICES ACCOUNT

Name and Address of Depository Institution: _____

Account Number: _____ Name of the Account: _____

(If a branch, provide the branch's address) _____

Persons Authorized to Write Checks on
 or Withdraw Money from the Account: _____

Date Account Was Opened: _____ Date Account Was Closed (if applicable): _____
Month/Day/Year Month/Day/Year

C. ACCOUNT BALANCE

Cash Balance of Campaign Account at Beginning of Reporting Period (\$)	Cash Balance of Campaign Account at End of Reporting Period (\$)	Total Amount of Contributions Received for Reporting Period (\$)	Total Amount of Expenditures Incurred for Reporting Period (\$)	Total Value of Goods and Services Obtained for Reporting Period (\$)

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D. FINANCIAL (MONEY) CONTRIBUTION INFORMATION

Name of Entity or Individual	Local Union (if applicable)	Date of Contribution	Street Address	City, State, Zip	Method of Contribution	Contribution Amount (\$)

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Total:						

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E. EXPENDITURE INFORMATION

Vendor or Service Provider	Date of Expenditure	Payment Method	Description and Purpose of Expenditure	Expenditure Amount (\$)

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Total:				

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F. GOODS AND SERVICES CONTRIBUTION INFORMATION

Name of Entity or Individual	Local Union (if applicable)	Date Good or Services Obtained	Street Address	City, State, Zip	Description and Purpose of Goods or Services	Value of Goods or Services Obtained (\$)

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Name of Entity or Individual	Local Union (if applicable)	Date Good or Services Obtained	Street Address	City, State, Zip	Description and Purpose of Goods or Services	Value of Goods or Services Obtained (\$)

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Total:						

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G. CERTIFICATION

(Full Legal Name)

State of _____, County of _____

I am authorized to submit this Campaign Financial Disclosure Form as (check one):

A Candidate running for office

The Treasurer of a Candidate’s campaign [Name of Candidate: _____]

The Treasurer of a Slate of Candidates [Name of Slate: _____]

The Treasurer of a Covered Party [Name of Covered Party: _____]

I declare under penalty of perjury that the foregoing is true and correct.

Executed on: _____

Signed: _____