

Return of Electorate Candidate Donations, Expenses and Loans for the 2023 General Election

DECLARATION

| 1. | Candidate na | me: | | | COMPLETING THE RETURN |
|----|--------------------------------------|--|------------------------------------|--|---|
| | Juan Alvarez | z De Lugo | | | You can complete the return electronically |
| | Party name (it | f applicable): | | | or by hand. If you complete the form |
| | ACT | | | | electronically each part will be automatically added up for you, as well |
| | Electorate co | ntested: | | | as the totals on this page of the return. |
| | New Lynn | | | | For information on types of electronic signatures that the Commission accepts, |
| 2. | | DATE DONATIONS | | | please see the How to Complete your Candidate Return Form for the General Election instruction sheet. |
| | Complete Par | ts A to E on pages 2 to 7 if you have a | ıny donatioı | ns to declare. | |
| | | ou have NO donations, or contributions declare under Parts A, C or D | to | NIL | CHECKLIST |
| | | idate donations of more than \$1,500 | | 0.00 | Step 1 completed |
| | than S | ymous candidate donations of more \$1,500 | | \$ 0.00 | Parts A to E completed or 'NIL' entered at step 2 |
| | Part D: Overs than S | seas candidate donations of more \$50 | | \$ 0.00 | Parts F and G completed or |
| | | Total (A | + C + D) | \$ 0.00 | 'NIL' entered at step 3 |
| 3. | TOTAL CANDI | DATE ELECTION EXPENSES | | | Part H completed or 'NIL' entered at step 4 |
| | Complete Par | ts F and G on pages 8 to 11 if you have | e any exper | ises to declare. | |
| | Write 'NIL' if yo | ou have NO expenses to declare | | NIL | Declaration signed and dated |
| | Part F: Cand | idate only election advertising | | \$ 0.00 | FILING THE RETURN |
| | | on advertisements shared with the and/or other candidates | | \$ 0.00 | Candidate returns must be filed with the Electoral Commission by 5pm, 14 February |
| | | Total | (F + G) | \$ 0.00 | 2024 (within 70 working days of election day). Candidates who fail to comply with |
| 4. | TOTAL CANDI | DATE LOANS | | | these requirements commit an offence and may be referred to the Police. |
| | Complete Pari | t H on page 12 if you have any loans to | o declare. | | • |
| | Write 'NIL' if yo | ou have NO loans to declare | | NIL | The return can be filed: by email to legal@elections.govt.nz |
| | Part H: Cand | idate loans | | \$ 0.00 | by delivery to Level 4, 34–42 Manners Street, Wellington 6011 |
| | | | | | Reminder: the returns are open to public inspection and will be published on |
| 5. | 214GA of the Electron my behalf, and | he best of my knowledge this return, filed purs storal Act 1993, is an accurate record of the ca I of election expenses incurred by me, or on my the 2023 general election and is not false in ar | ndidate donati / behalf, and lo | ons made to me, or cans given to me for | www.elections.nz. |
| | SIGNATURE | your O | DATE: DD / MM | 1/2023 | |
| | 4 | | | | SAVE AS PRINT |

INFORMATION ON CANDIDATE DONATIONS, ELECTION EXPENSES AND LOANS

WHO MUST FILE A RETURN?

All electorate candidates at the 2023 general election must file a return of candidate donations, election expenses and loans. Even if you have no donations, expenses or loans to declare, you **MUST** still complete the candidate return recording **'NIL'** donations, expenses and loans.

KEEPING RECORDS OF DONATIONS, EXPENSES AND LOANS

Candidates must keep good records of all candidate donations, candidate expenses and loans. Candidates must keep invoices and receipts for all election expenses of \$50 or more for three years after returns are filed.

Further information on candidate donations, expenses and loans is available in the Candidate Handbook - General Election 2023

DONATIONS Complete Parts A to E

Information on Candidate Donations

Candidates are required to include in the candidate return every candidate donation or contribution to a candidate donation of more than \$1,500 (including GST), including a series of donations or contributions made by one person that adds up to more than \$1,500.

Candidate donations

A candidate donation includes any money, goods or services that are donated to a candidate, or a person on the candidate's behalf, for use in the candidate's campaign for election. The following are candidate donations:

- free goods or services that have a reasonable market value greater than \$300 (or \$50 if provided by an overseas person);
- discounted goods or services where the reasonable market value of the goods or services is greater than \$300 (or \$50 if provided by an overseas person);
 - the difference between the contract or agreed price and the reasonable market value of those goods and services is a donation;
- the purchase of goods or services from the candidate at a value that exceeds their reasonable market value:
 - the difference between the price paid and reasonable market value is a donation;
- · extending credit to a candidate on favourable terms;
 - the value of the favourable terms is a donation.

The following are not a candidate donation:

- free labour
- goods or services provided free of charge to a candidate, or to any person on the candidate's behalf, that have a reasonable market value of \$300 or less (or \$50 or less if from an overseas person), or
- money provided by the candidate for his or her own campaign.

Instructions for Part A

For donations of more than \$1,500 (other than anonymous donations or overseas donations) you need to record the name and street address of the donor, the date the donation was received and the amount received from the donor.

Where you have received a number of donations from the same donor you should include each date on which a donation was received from the donor and the aggregated total from the donor. Aggregated donations are not contributions and do not have to be recorded in Part B.

You also need to confirm whether any person (other than the donor) has contributed more than \$1,500 to the donation (or more than \$50 if the contributor is an overseas person). Contributions of more than \$1,500 must be disclosed in Part B (or Part E for contributions of more than \$50 from an overseas person).

Example:

John Smith owns a publishing company. On 1 November 2022 he gives you goods for your campaign valued at \$1,000. On 10 November 2022 he also gives you a monetary donation of \$4,000. The money was given to you as the result of a fundraiser which John Smith organised and includes a contribution from Jane Jones of \$2,000.

PART A: CANDIDATE DONATIONS OF MORE THAN \$1,500

OTHER THAN ANONYMOUS OR OVERSEAS DONATIONS

| WRITE 'NIL' IF | YOU HAVE NO DONATIONS | TO DECLARE HERE: | |
|--|---|--|--|
| | | TOTAL FOR PART A | 0.00 |
| Donor's name and street address | Date donation or aggregated donations received dd/mm/yyyy | Does the donation contain contributions from another person of more than \$1,500? Enter YES or NO If YES complete Part B | Amount of donation or total aggregated donations (including GST) |
| EXAMPLE: John Smith, Smiths Publishing 35 Main Street, Suburb Wellington | 1/11/2022, 10/11/2022 | Yes | \$5,000.00 |
| | | | |
| | | | |
| | | | |

| Donor's name and street address | Date donation or aggregated donations received dd/mm/yyyy | Does the donation contain contributions from another person of more than \$1,500? Enter YES or NO If YES complete Part B | Amount of donation or total aggregated donations (including GST) \$0.00 |
|---------------------------------|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

PART B: CONTRIBUTIONS OF MORE THAN \$1,500

Instructions for Part B - Contributions

A contribution is money, goods or services that makes up a donation or is included in a donation or has been used to wholly or partly fund a donation, that was given to the donor or a person who was expected to pass the contribution to the donor.

Only complete Part B if the donation in Part A includes a contribution, from someone other than the donor, exceeding \$1,500.

For each contribution recorded in Part B you will need to provide:

• the name and street address of each contributor; and

- the amount of each contribution made by the contributor or, in the case of multiple contributions, the total amount of the contributions;
- the date on which each donation funded from the contributions was made (this should be the same date included in Part A for the related donation).

Please do not include the Part B total with the overall donations total on page 1 of the return.

| WRITE 'NIL' IF YOU H | AVE NO CONTRIBUTIONS T | O DECLARE HERE: | |
|--|---|--|---|
| | | TOTAL FOR PART B | \$ 0.00 |
| Contributor's name and street address | Date the related donation funded from contributions was made dd/mm/yyyy | Name of donor in Part A to which this contribution relates | Amount of contribution (including GST) \$0.00 |
| EXAMPLE: Jane Jones 1 Side Street, Suburb Wellington | 10/11/2022 | John Smith | \$2,000.00 |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

PART C: ANONYMOUS CANDIDATE DONATIONS OF MORE THAN \$1,500

Instructions for Part C - Anonymous donations

An anonymous donation is a donation made in such a way that the candidate who receives the donation does not know the identity of the donor and could not, in the circumstances, reasonably be expected to know the identity of the donor.

If you receive an anonymous candidate donation greater than \$1,500, you may retain \$1,500 of that donation. The balance of the donation must, within 20 working days of receipt, be paid to the Electoral Commission for payment into a Crown bank account.

In the candidate return, you must disclose:

- the date the donation was received; and
- · the amount received; and
- the date payment to the Electoral Commission was made; and
- the amount paid to the Electoral Commission.

| WRITE 'NIL' IF YO | OU HAVE NO ANONYMOUS DONA | TIONS TO DECLARE HERE: | |
|---|---|--|--|
| | | TOTAL FOR PART C | \$ 0.00 |
| Date anonymous donation received dd/mm/yyyy | Amount of anonymous donation (including GST) \$0.00 | Date paid to the Electoral Commission dd/mm/yyyy | Amount paid to the Electoral Commission (including GST) \$0.00 |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

PART D: OVERSEAS CANDIDATE DONATIONS OF MORE THAN \$50

Instructions for Part D – Donations from overseas persons

An overseas person is:

- an individual who resides outside New Zealand and is not a New Zealand citizen or registered elector; or
- · a body corporate incorporated outside New Zealand; or
- an unincorporated body that has its head office or principal place of business outside New Zealand.

If you receive a candidate donation from an overseas person exceeding \$50 (including free goods and services or a discount on goods or services exceeding \$50) you may retain \$50 of that donation. The balance of the donation must, within 20 working days of receipt, either be returned to the overseas person who made the

donation, or if this is not possible, be paid to the Electoral Commission. Further guidance is available in the *Candidate Handbook – General Election 2023*.

In the candidate return, you must disclose:

- the name and address of the overseas person; and
- the date that the donation was received or, in the case of multiple donations, the date each donation was received; and
- the amount of the donation or, in the case of aggregated donations, the total amount of the donations; and
- the amount returned to the overseas person or paid to the Electoral Commission, and the date that such payment was made.

| WRITE 'NIL' IF YOU HAVE NO | OVERSEAS DONATIONS | TO DECLARE HERE: | | |
|--|--|--|--|--|
| | | TOTAL FOR PART D | \$ | 0.00 |
| Overseas donor's name and street address | Date donation received or (dates received if aggregated donations) dd/mm/yyyy | Amount of donation or total aggregated donations (including GST) | overseas done Electoral Co date of that re | curned to the or or paid to the mmission and turn or paymenting GST) |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

PART E: CONTRIBUTIONS FROM OVERSEAS PERSON OF MORE THAN \$50

Instructions for Part E – Contributions from overseas persons

If you receive any donation from a donor who is not an overseas person that includes a contribution from an overseas person greater than \$50 (either on its own or when aggregated with all other contributions to the donation by the same overseas person), you must return the whole donation to the donor. If that is not possible, you must forward the whole donation to the Electoral Commission.

In the candidate return, you must disclose:

· the name and address of the overseas person; and

- the amount of the contribution or the total amount of aggregated contributions; and
- the date on which the related donation funded from the contribution was made; and
- the amount paid back to the donor or paid to the Electoral Commission, and the date that such payment was made.

Please do not include Part E total with the overall donations total on page 1 of the return.

| WRITE 'NIL' IF YOU HAVE NO OVE | RSEAS CONTRIBUTIONS | S TO DECLARE HERE: | | |
|--|--|--|---|--|
| | | TOTAL FOR PART E | \$ | 0.00 |
| Overseas contributor's name and street address | Date the related donation funded from the contribution was made dd/mm/yyyy | Amount of contribution or total aggregated contributions (including GST) | donor or paid Commissio that return | turned to the to the Electoral and date of or payment ing GST) dd/mm/yyyy |
| | | | | |
| | | | | |
| | | | | |
| , | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

ELECTION EXPENSES Complete Parts F and G

Your election expenses during the regulated period (14 July to 13 October 2023) must not exceed \$32,600 (including GST). It is an offence to spend more than this.

Information on Candidate Expenses

Candidate election expenses are the costs of advertising in any medium that:

- may reasonably be regarded as encouraging or persuading voters to vote, or not to vote, for an electorate candidate (whether or not the name of the candidate is stated), and
- are published, or continue to be published, during the regulated period for the general election, and
- are promoted by the candidate or with the candidate's authority.

Election expenses include:

- the costs incurred in the preparation, composition, printing, postage and publication of the advertisement, and
- the reasonable market value of any material used or applied towards the advertisement provided to the candidate for free or below reasonable market value.

A candidate's deposit or the costs of hall hire, refreshments, the conduct of surveys or opinion polls, free labour, the framework that supports hoardings (other than a commercial framework) or replacing materials that have been destroyed through no fault of the candidate are not election expenses.

Further guidance is available in the *Candidate Handbook - General Election 2023*.

Instructions on how to complete Part F

You should record all election expenses incurred in relation to candidate advertisements published, or continued to be published, during the regulated period for the general election promoted by you or with your written authority.

For advertisements published both before and during the regulated period you should apportion the costs so that only a fair proportion of the expenses are attributed to being incurred during the regulated period. Only record the amount attributable to the regulated period in the return.

Disclose the total amount incurred on election advertisements (including GST) published during the regulated period even if payment for the advertising was made outside of the regulated period.

PART F: CANDIDATE ONLY ELECTION ADVERTISING

| WRITE 'NIL' IF YOU HAVE NO EXPENSE | S TO DECLARE HERE: | |
|---|--------------------|---------------------------------|
| | TOTAL FOR PART F | \$ 0.00 |
| Item description Provide details of the type of advertisement, name of advertiser or supplie volume, duration and size as appropriate | r, | Value \$0.00 (including GST) |
| EXAMPLE: Dominion Post; Two full page advertisements: 25 September 2023 | | \$120.00 |
| EXAMPLE: Facebook promotional posts x 12: 1 September – 6 October 2023 | | \$50.00 |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

| Item description Provide details of the type of advertisement, name of advertiser or supplier, volume, duration and size as appropriate | Value \$0.00 (including GST) |
|---|---------------------------------|
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

PART G: ELECTION ADVERTISEMENTS SHARED WITH THE PARTY AND/OR OTHER CANDIDATES

Instructions on how to complete Part G

You should record all election expenses incurred in relation to election advertisements published, or continued to be published, during the regulated period for the general election (14 July to 13 October 2023) promoting your candidacy and the party and/or one or more other candidates.

Apportionment is permitted between a candidate and party(ies) and other candidate(s) based on coverage. Where an expense item has been apportioned between you and the party and/or candidate(s) you should ensure there is a consistent description and approach to apportionment in each return of election expenses. Record the name

of the party or other candidate(s) featured in the advertising in the item description.

For advertisements published both before and during the regulated period you should apportion the costs so that only a fair proportion of the expenses are attributed to being incurred during the regulated period. Only record the amount attributable to the regulated period in the return.

Disclose the total amount incurred on election advertisements published during the regulated period even if payment for the advertising was made outside of the regulated period.

| | | TOTAL FOR PART G | \$ 0.00 |
|--|-------------------------------|------------------------------------|---------------------------------|
| Item description Provide details of the type of advertisement, name of advertiser or supplier, volume, duration and size as appropriate | Total cost (including GST) | % apportioned as candidate expense | Value \$0.00 (including GST) |
| XAMPLE: ier: 30 September to 10,000 households eaturing the Growth Party | \$2000.00 | 10% | \$200.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |

| Item description Provide details of the type of advertisement, name of advertiser or supplier, volume, duration and size as appropriate | Total cost (including GST) | % apportioned as candidate expense | Value \$0.00 (including GST) |
|--|-------------------------------|------------------------------------|---------------------------------|
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |
| | | | \$ 0.00 |

PART H: CANDIDATE LOANS

Instructions for Part H - Candidate loans

A candidate loan is a written or oral agreement under which a lender lends money to a candidate for their campaign.

Money lent by a registered bank at a commercial interest rate is not a candidate loan, nor are credit cards and overdraft facilities with registered banks.

All candidate loans, no matter the size, must be reported in **Part H**. Loans from the same lender need to be aggregated.

| | | TOTAL FOR PART H | \$ 0.00 |
|--|--|--------------------------------------|---|
| Lender's name and street address | Loan amount (including GST) \$0.00 | Date loan entered into dd/mm/yyyy | Repayment date (if no repayment date, specify "no repayment date" here) |
| Guarantor's name and street address (if any) | Unpaid balance of loan \$0.00 | Interest rate or rates | Details of security given |
| Any terms (that enable the lender to reduce or ext | inguish the loan amount and/o | r interest or grant any concess | sion in respect of repayment) |
| | | | |
| Lender's name and street address | Loan amount (including GST) \$0.00 | Date loan entered into dd/mm/yyyy | Repayment date (if no repayment date, specify "no repayment date" here) |
| Lender's name and street address | (including GST) | | (if no repayment date, specify |