



**Elaine F. Marshall, North Carolina Secretary of State**  
**2024 Reportable Expenditures Made by Persons Exempted**  
**Or Otherwise Not Covered by G.S. §120C (See G.S. §120C-800)**

**MAILING ADDRESS:** Lobbying Compliance Division  
 Department of the Secretary of State  
 PO Box 29622  
 Raleigh, NC 27626-0622

**STREET ADDRESS:** 2 South Salisbury Street  
 Raleigh, NC 27601-2903

**WEB:** <https://www.sosnc.gov/>

Amended Report  (Check if filing amended report)  
 Original Tracking No. \_\_\_\_\_

\*No fee for filing electronically

**PERIOD: Quarter Ended:** \_\_\_\_\_

**Legal Name of Donor Individual or Entity:** \_\_\_\_\_

**Name and Title of Authorized Representative of Donor Entity if applicable:**

\_\_\_\_\_

**Mailing Address of Donor/Authorized Representative:**

\_\_\_\_\_

**Physical Address of Donor/Authorized Representative:**

\_\_\_\_\_

**Telephone of Donor/Authorized Representative:** \_\_\_\_\_

**Fax:** \_\_\_\_\_ **Email Address:** \_\_\_\_\_

**PART I: REPORTABLE EXPENDITURES**

**\*EXPENSE CODES\***

<b>TL</b>	Transportation and Lodging	<b>FB</b>	Food and Beverages	<b>GI</b>	Gifts
<b>EN</b>	Entertainment	<b>ME</b>	Meetings and Events	<b>OT</b>	Other
<b>SC</b>	Scholarship (Grant-In-Aid to Attend Conference, Meeting or Event)				

Date	Description of Expenditure <small>(Indicate whether donor was outside North Carolina and whether donee was outside North Carolina at time expenditure was accepted)</small>	Designated Individual Accepting Expenditure	Exp. Code*	Amount

**Total (Must enter total or "0")** \$ \_\_\_\_\_

**PART II: SCHOLARSHIPS**

Date	Description of Conference, Meeting or Event <small>(In description of conference, meeting or event, indicate whether donor was outside North Carolina at time expenditure accepted)</small>	Designated Individual Accepting Scholarship	Exp. Code*	Amount

Total **(Must enter total or "0")** \$ \_\_\_\_\_

**PART III: FOR USE BY DESIGNATED INDIVIDUAL FILERS ONLY**

Full Name of Designated Individual/Public Servant: \_\_\_\_\_

Government Agency: \_\_\_\_\_

Title: \_\_\_\_\_

Business Address (Physical): \_\_\_\_\_

\_\_\_\_\_

Mailing Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**PART IV: CERTIFICATION**

I hereby certify that the information contained herein is to the best of my knowledge true, correct and complete.

\_\_\_\_\_  
 Signature of Filer:  Individual Donor \_\_\_\_\_  
 (Check One)  Authorized Representative for Donor Entity Date  
 Designated Individual Donee

\_\_\_\_\_  
 Printed Name/Title of Filer

**PART V: REPORT PREPARER'S IDENTITY/SIGNATURE (RULE 18 NCAC 12 .0205)**

Printed Full Name of Report Preparer: \_\_\_\_\_

Signature of Report Preparer: \_\_\_\_\_

**FOR INFORMATIONAL USE ONLY; DISCARD BEFORE FILING.**

- Expense reports are due quarterly, regardless of whether reportable expenditures are made, no later than 15 business days after the end of the calendar quarter.
- Do not use a zero expense report form for a monthly report or for a quarterly report that requires incorporation of a prior monthly report. Incomplete reports may be rejected.
  - In addition, any reportable expenditure incurred while the General Assembly is in session with respect to lobbying legislators and legislative employees is reportable monthly no later than 10 business days after the end of the month.
  - The information reported on any monthly report should be incorporated by reference on the long quarterly report form in the space provided.
- NCGS § 120C-401(d) states: Each report required by this Article shall be in the form prescribed by the Secretary of State and filed electronically.
- E-file your report by using the Lobbying Compliance Division Portal on our website: <https://www.sosnc.gov/>

### **IMPORTANT NOTICES REGARDING ELECTRONIC FILINGS**

NCGS § 120C-800(f) states: Within 15 business days after the end of the quarter in which the reportable expenditure was made, reports required by this section shall be filed electronically with the Secretary of State in a form prescribed by the Secretary of State. An electronic filing made pursuant to this section is sufficient to comply with the filing requirements of this article if the filing is properly formatted as prescribed by this article and the information contained in the filing is complete and correct.