THE STATE OF MONTANA
COMMISSIONER OF POLITICAL PRACTICES
1209 8th Avenue
PO Box 202401
Helena MT 59620-2401
Phone: 406-444-2942
Fax: 406-444-1643

Instructions for

FORM L-5 Lobbying Financial Report

Who is required to file?

Any "principal" who makes payments or agrees to make payments exceeding $2,550 in a calendar year for the purpose of lobbying* must complete and file Form L-5.

Businesses, associations, government agencies and others who pay lobbyists to work on their behalf are termed "principals."

All payments made to support or assist lobbying activity must be reported, whether the payments are made to registered lobbyists, other individuals engaged in lobbying activities, or support staff.

> *lobbying is the act of promoting, opposing, or modifying the introduction or enactment of legislation. See § 5-7-208 and 5-7-112, MCA; and § 44.12.202, ARM for more information.

When must Form L-5 be filed?

Once a principal registers for the purpose of lobbying, an initial (January) report *must be filed.*

The principal must also file the post-session report, and a report covering the post-session to year-end time frame. These reports are required whether or not there was reportable activity.

Monthly reports for February and March are only required if the principals lobbying payments exceed $5000 for the month.

There are four categories of reportable activity:

a. Payments and activity of the lobbyist who must register on Form L-1 because he or she is paid or agrees to be paid at least $2,550 to lobby;
b. Payments and activity of the individual who engages in lobbying but who does not have to register (because he or she is not paid more than $2,550 to lobby);
c. The cost of support staff paid to support or assist lobbying activity; and
d. Equipment, advertising, supplies, social expenditures and office space used to support or assist lobbying activity.

Where must the form be filed?

File one copy with the Commissioner of Political Practices. The report may be faxed, but the original must be submitted to the Commissioner immediately thereafter. A copy must be retained by the principal for three years, along with all records relied on to prepare the report.

Please detach this instruction page before filing Form L-5.

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For Office Use Only
Date Received

Postmark date (if filed late)

Form L-5 (Revised 10/18)

Lobbying Financial Report

To be filed by the Principal

Original filing ☐ **Amended filing** ☐

2019 Legislative Session Year Report

January 1 – January 31 (due February 15, 2019)	☐
February 1 – February 28 (due March 15, 2019)	☐
March 1 - March 31 (due April 15, 2019)	☐
April 1 - End of Session (due 30 days after adjournment)	☐
End of Session - December 31 (due February 15, 2020)	☐
If lobbying payments were made this calendar year and previously reported, but *no additional payments or contributions have been made or received,* check this box and file only this page.	☐
In the event of *Special Legislative Session(s)* the following will apply:	
Adjournment of Special Session (due 30 days after adjournment)	☐
Non Session Year End January-December 31, 2018 (due February 15, 2019)	☐

***Please read the instructions** before preparing and filing this report. Type or print in ink. All information is required — to better understand the requirements, see § 5-7-208 and 5-7-112, MCA; and § 44.12.202, ARM.

____
Full name of principal

____
Complete business mailing address (Including City, State, Zip)

Certification

I, ____, ___________________
(Please print name of principal's authorized representative) (Title)

certify that the facts stated in this report are true and correct to the best of my knowledge and belief.

____ ________ _____________
SIGNATURE of Authorized Representative of Principal Date Phone Number

Part 1

Please see the attached instructions to determine who is required to file this form and what must be reported. More detail can be found in §§ 5-7-102, 5-7-112, and 5-7-208, Montana Code Annotated (MCA), and 44.10.202, Administrative Rules of Montana (ARM).

A. During this reporting period payments were made to the following lobbyists. Payments include salaries and fees, allowances, rewards, and contingency fees. Reimbursement for personal living expenses do not have to be reported.

Full Name of Lobbyist Paid (Please Print)	Date lobbyist will cease to represent Principal

If additional space is required, provide information on a separate sheet and attach it to report.

B. This reporting period, the following payments were made:

	Amount Paid
Total reportable payments to lobbyists (those listed in section A above)	$
Total payments to individuals other than registered lobbyists employed or retained to lobby or to support or assist lobbying activity.	
Travel expenses	
Advertising (include production costs)	
Entertainment (include all food and refreshments)	
Communication (include phone, fax, e-mail)	
Postage	
Printing	
Other office expenses	
Total payments for lobbying activity this reporting period	$

Part 2

List each bill draft request, bill number, and legislative issue for which a major effort was exerted. Provide sufficient detail, i.e. “no-fault insurance,” “methane gas regulation,” etc., and state the Principal’s position.

This part is required in accordance with § 5-7-208(5)(d), MCA. See 44.12.102(6), ARM, for more information.

Issue: LC #, SB #, HB #	Position (support, oppose or modify)

If needed, provide additional information on a separate sheet.

Part 3

List each earmarked contribution and membership fee of $250 or more paid to the principal to promote, oppose, or modify the introduction or enactment of legislation. Provide the full name of each payer, the issue, and the amount, aggregated from January 1 to December 31.

This part is required in accordance with 5-7-208(5)(c), MCA.

Full name and complete mailing address of member or contributor	Amount	Issue area earmarked
	$	
	$	
	$	

If needed, provide additional information on a separate sheet.

Part 4

Itemize each separate payment of $25 or more paid to the benefit of any public official, and each separate payment of $100 or more paid to the benefit of more than one public official. These benefits must be reported as an expense in Part I.

This part is required in accordance with 5-7-208(5)(b), MCA.

Full name of payee	Benefit amount	Name of official receiving the benefit
	$	
	$	

If needed, provide additional information on a separate sheet.

Submit

Notice: You must follow up with a signed hard copy to CPP.