

**Instructions**

All candidates must complete Boxes A and B. Candidates who receive contributions or incur expenses must complete Boxes C, D, Schedule 1 and Schedule 2 as appropriate. Candidates who receive contributions or incur expenses in excess of \$10,000 must also attach an Auditor's Report.

All surplus funds (after any refund to the candidate or their spouse) shall be immediately paid to the clerk who is responsible for the conduct of the election.

For the campaign period from (day clerk received nomination) 

YYYY	MM	DD
2 0 2 2	0 5	0 1

 to 

YYYY	MM	DD
2 0 2 2	1 2	3 1

- Initial filing reflecting finances from start of campaign to December 31 (or 45 days after voting day in a by-election)
- Supplementary filing reflecting finances from start of campaign to end of extended campaign period

**Box A: Name of Candidate and Office**

Candidate's name as shown on the ballot

Last Name or Single Name BEATTIE	Given Name(s) JEFFREY
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Office for Which the Candidate Sought Election COUNCILLOR	Ward Name or Number (if any) 10
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Municipality  
HAMILTON

Spending Limit General \$30,110.70	Parties and Other Expressions of Appreciation \$3,011.07	Contribution Limit Contributions from Candidate and Spouse \$10,908.40
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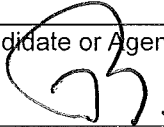

I did not accept any contributions or incur any expenses. (Complete Boxes A and B only)

**Box B: Declaration**

I, JEFFREY BEATTIE, declare that to the best of my knowledge and belief that these financial statements and attached supporting schedules are true and correct.

X   
\_\_\_\_\_  
Signature of Candidate

2023/03/24  
\_\_\_\_\_  
Date (yyyy/mm/dd)

Date Filed (yyyy/mm/dd) 2023/03/31	Time Filed 10:09am	Initial of Candidate or Agent (if filed in person) 	Signature of Clerk or Designate 
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**City of Hamilton**  
**MAR 31 2023**  
**Elections**

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**Box C: Statement of Campaign Income and Expenses**

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**LOAN**

Name of bank or recognized lending institution

Amount borrowed  
\$

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**INCOME**

Total amount of all contributions (from line 1A in Schedule 1)	+ \$	14,924.06
Revenue from items \$25 or less	+ \$	
Sign deposit refund	+ \$	
Revenue from fundraising events not deemed a contribution (from Part III of Schedule 2)	+ \$	3,788.45
Interest earned by campaign bank account	+ \$	
Other (provide full details)		
1.	+ \$	
2.	+ \$	
3.	+ \$	
4.	+ \$	
5.	+ \$	
6.	+ \$	

**Total Campaign Income (Do not include loan)****= \$ 18,712.51 C1****EXPENSES** (Note: Include the value of contributions of goods and services)**1. Expenses subject to general spending limit**

Inventory from previous campaign used in this campaign (list details in Table 2 of Schedule 1)	+ \$	2,492.02
Advertising	+ \$	1,571.66
Brochures/flyers	+ \$	3,672.09
Signs (including sign deposit)	+ \$	2,505.21
Meetings hosted	+ \$	
Office expenses incurred until voting day	+ \$	178.71
Phone and/or internet expenses incurred until voting day	+ \$	248.66
Salaries, benefits, honoraria, professional fees incurred until voting day	+ \$	
Bank charges incurred until voting day	+ \$	13.32
Interest charged on loan until voting day	+ \$	
Other (provide full details)		
1. PEACH FESTIVAL BOOTH	+ \$	945.90
2. CAMPAIGN VOLUNTEER SHIRTS	+ \$	938.27
3. MEALS FOR VOLUNTEERS	+ \$	214.47
4. WEBSITE	+ \$	385.00
5. POSTAGE	+ \$	1,117.76
6. RENT	+ \$	3,000.00
<b>Total Expenses subject to general spending limit</b>	<b>= \$</b>	<b>17,283.07 C2</b>

**2. Expenses subject to spending limit for parties and other expressions of appreciation**

1. ELECTION NIGHT FOOD AND BEVERAGES	+ \$	920.10
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2.		+ \$	
3.		+ \$	
4.		+ \$	
5.		+ \$	
<b>Total Expenses subject to spending limit for parties and other expressions of appreciation</b>		= \$	<b>920.10 C3</b>

**3. Expenses not subject to spending limits**

Accounting and audit		+ \$	282.50
Cost of fundraising events/activities (list details in Part IV of Schedule 2)		+ \$	213.57
Office expenses incurred after voting day		+ \$	
Phone and/or internet expenses incurred after voting day		+ \$	
Salaries, benefits, honoraria, professional fees incurred after voting day		+ \$	
Bank charges incurred after voting day		+ \$	2.90
Interest charged on loan after voting day		+ \$	
Expenses related to recount		+ \$	
Expenses related to controverted election		+ \$	
Expenses related to compliance audit		+ \$	
Expenses related to candidate's disability (provide full details)			
1.		+ \$	
2.		+ \$	
3.		+ \$	
4.		+ \$	
5.		+ \$	
Other (provide full details)			
1.		+ \$	
2.		+ \$	
3.		+ \$	
4.		+ \$	
5.		+ \$	
<b>Total Expenses not subject to spending limits</b>		= \$	<b>498.97 C4</b>

**Total Campaign Expenses (C2 + C3 + C4)** = \$ **18,702.14 C5**

**Box D: Calculation of Surplus or Deficit**

Excess (deficiency) of income over expenses (Income minus Total Expenses) (C1 – C5)		+ \$	10.37 D1
If there is a surplus, deduct any refund of candidate's or spouse's contributions to the campaign		- \$	
Surplus (or deficit) for the campaign		= \$	<b>10.37 D2</b>

If line D2 shows a surplus, the amount must be paid in trust, at the time the financial statements are filed, to the municipal clerk who is responsible for the conduct of the election.



**Table 3: Monetary contributions from individuals other than candidate or spouse**

Name	Full Address	Date Received (yyyy/mm/dd)	Amount Received (\$)	Amount Returned to Contributor or Paid to Clerk (\$)
VIV SAUNDERS	3 FRANCES AVE, STONEY CREEK, ON L8E 2Y6	2022/06/27	1,000.00	
GINETTE STAHL	90 GLENSHTON DRIVE, STONEY CREEK, ON L8G4G1	2022/07/26	150.00	
CASSANDRA D'AMBROSIO	37-311 IGHWAY 8, STONEY CREEK, ON L8G 5G5	2022/08/04	250.00	
KATHLEEN ELLIOTT	309-301 FRANCES AVE, STONEY CREEK, ON L8E 3W6	2022/08/08	1,100.00	
TAMMY FELTS	92 REDCEDAR CRES, STONEY CREEK, ON L8E 0G3	2022/08/24	200.00	
FRANK JALSEVAC	1901-301 FRANCES AVE, STONEY CREEK, ON L8E 3W6	2022/09/06	1,200.00	
GARY SAWCHUK	61 BEN TIRRON CRES, STONEY CREEK, ON L8G4V6	2022/09/06	200.00	
CATHARINE NAPHOLC	150 WINONA ROAD, WINONA, ON L8E 5K4	2022/09/10	150.00	
HAROLD JONES	45 WINDEMERE ROAD, WINONA, ON L8E 5G5	2022/09/13	200.00	
SHELLEY BAKER-GRACIE	367 MONTREAL CIRCLE, WINONA, ON L8E0C7	2022/10/08	400.00	
GEORGINA CHURCH	152 MCNEILLY ROAD, WINONA, ON L8E 5J1	2022/10/18	300.00	
JAMES STEWART BEATTIE	1375 HIGHWAY 8, WINONA, ON L8E 5R1	2022/11/03	1,200.00	
THOMAS MOORE	95 CAMERON AVE S, HAMILTON, ON L8K2X5	2022/10/18	300.00	300.00
THOMAS MOORE	95 CAMERON AVE S, HAMILTON, ON L8K2X5	2022/12/22	300.00	
<b>Total</b>			<b>6,950.00</b>	

Additional information is listed on separate supplementary attachment, if completed manually.

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**Table 4: Contributions in goods or services from individuals other than candidate or spouse**

(Note: Must also be recorded as Expenses in Box C.)

Name	Full Address	Description of Goods or Services	Date Received (yyyy/mm/dd)	Value (\$)

Name	Full Address	Description of Goods or Services	Date Received (yyyy/mm/dd)	Value (\$)
<b>Total</b>				

Additional information is listed on separate supplementary attachment, if completed manually.

**Total for Part III – Contributions exceeding \$100 per contributor**  
**(Add totals from Table 3 and Table 4 and record the total in Part 1 – Summary of Contributions)**      \$ 6,950.00 1B

**Schedule 2 – Fundraising Events and Activities**

Complete a separate schedule for each event or activity held.

Additional schedule(s) attached, if completed manually.

**Fundraising Event/Activity 1**

Description of fundraising event/activity MEET AND GREET - KELSEY'S 12358 SOUTH SERVICE ROAD

Date of event/activity (yyyy/mm/dd) 2022/07/24

**Part I – Ticket revenue**

Admission charge (per person) \$ \_\_\_\_\_ **2A**

(If there are a range of ticket prices, attach complete breakdown of all ticket sales)

Number of tickets sold x \_\_\_\_\_ **2B**

**Total Part I (2A X 2B) (include in Part I of Schedule 1)** = \$ \_\_\_\_\_

**Part II – Other revenue deemed a contribution**

Provide details (e.g., revenue from goods sold in excess of fair market value)

- 1. \_\_\_\_\_ + \$ \_\_\_\_\_
- 2. \_\_\_\_\_ + \$ \_\_\_\_\_
- 3. \_\_\_\_\_ + \$ \_\_\_\_\_
- 4. \_\_\_\_\_ + \$ \_\_\_\_\_
- 5. \_\_\_\_\_ + \$ \_\_\_\_\_

**Total Part II (include in Part I of Schedule 1)** = \$ \_\_\_\_\_

**Part III – Other revenue not deemed a contribution**

Provide details (e.g., contribution of \$25 or less; goods or services sold for \$25 or less)

- 1. PASS THE HAT + \$ 388.45
- 2. WINONA PEACH FESTIVAL AUG. 28, 2022 + \$ \_\_\_\_\_
- 3. \$10 TO PARK OVER 3 DAYS - 340 VEHICLES + \$ 3,400.00
- 4. \_\_\_\_\_ + \$ \_\_\_\_\_
- 5. \_\_\_\_\_ + \$ \_\_\_\_\_

**Total Part III (include under Income in Box C)** = \$ 3,788.45

**Part IV – Expenses related to fundraising event or activity**

Provide details

- 1. INVITATIONS + \$ 213.57
- 2. \_\_\_\_\_ + \$ \_\_\_\_\_
- 3. \_\_\_\_\_ + \$ \_\_\_\_\_
- 4. \_\_\_\_\_ + \$ \_\_\_\_\_
- 5. \_\_\_\_\_ + \$ \_\_\_\_\_

**Total Part IV Expenses (include under Expenses in Box C)** = \$ 213.57

**Auditor's Report – Municipal Elections Act, 1996 (Section 88.25)**

A candidate who has received contributions or incurred expenses in excess of \$10,000 must attach an auditor's report.

Professional Designation of Auditor  
Licensed Public Accountant, LPA, CA

Municipality Stoney Creek	Date (yyyy/mm/dd) 2023/03/24
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**Contact Information**

Last Name or Single Name Lutyk	Given Name(s) Alan	Licence Number 1-16225
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**Address**

Suite/Unit Number 225	Street Number 1100	Street Name South Service Road
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Municipality Stoney Creek	Province Ontario	Postal Code L8E 0C5
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Telephone Number 905-643-1318	Email Address alutykca@ca.inter.net
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The report must be done in accordance with generally accepted auditing standards and must:

- set out the scope of the examination
- provide an opinion as to the completeness and accuracy of the financial statement and whether it is free of material misstatement

Report is attached

Personal information, if any, collected on this form is obtained under the authority of sections 88.25 and 95 of the *Municipal Elections Act, 1996*. Under section 88 of the *Municipal Elections Act, 1996* (and despite anything in the *Municipal Freedom of Information and Protection of Privacy Act*) documents and materials filed with or prepared by the clerk or any other election official under the *Municipal Elections Act, 1996* are public records and, until their destruction, may be inspected by any person at the clerk's office at a time when the office is open. Campaign financial statements shall also be made available by the clerk in an electronic format free of charge upon request.



# **Auditor's Report – Financial Statements**

## **Jeffrey Beattie Councillor Campaign**

**To: Jeffrey Beattie, the City of Hamilton and the Chief Electoral Officer of Ontario:**

I have audited the campaign period financial statements of the Jeffrey Beattie Councillor Campaign, which comprise of the statement of assets and liabilities as at December 31, 2022, the statements of campaign income and expenses and calculation of surplus or deficit for the campaign period from May 1, 2022 to December 31, 2022. These financial statements have been prepared in accordance to the Ontario Election Finances Act and guidance issued by the Chief Electoral Officer.

### **Management's Responsibility for the Financial Statements**

The Chief Financial Officer of the candidate is responsible for the preparation and fair presentation of these financial statements in accordance with the financial reporting provisions of Section 42 of the Ontario Election Finances Act and guidance issued by the Chief Electoral Officer and for such internal control as she determines is necessary to enable the preparation of the financial statements that are free from material misstatement, whether due to fraud or error.

### **Auditor's Responsibility**

My responsibility is to express an opinion on these financial statements based on my audit. I conducted my audit in accordance with Canadian generally accepted auditing standards. Those standards require that I comply with ethical requirements and plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement. An audit involves performing procedures to obtain audit evidence about the amounts and disclosure in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statement, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. An audit also includes evaluating the appropriateness of accounting principles used and the reasonableness of accounting estimates made by management, as well as evaluating the overall presentation of the financial statements. I believe that the audit evidence I have obtained is sufficient and appropriate to provide a basis for my audit opinion.

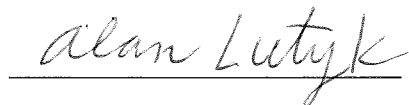
### **Basis for Qualified Opinion**

Due to the inherent nature of the transactions of organizations of this type, the completeness of the various categories of income and expenses is not susceptible to satisfactory audit verification. Accordingly, my verification of income and expenses was limited to the amount recorded in the records of the Jeffrey Beattie Councillor Campaign and I was not able to determine whether any adjustments might be necessary to income, expenses and period surplus for the period May 1, 2022 to December 31, 2022 and assets and liabilities to December 31, 2022.

### **Qualified Opinion**

In my opinion, except for the possible effects of the matter described in the Basis for Qualified Opinion paragraph, these financial statements presents fairly, in all material respects, the financial position of the Jeffrey Beattie Councillor Campaign as at December 31, 2022 and its income and expenses for the campaign period from May 1, 2022 to December 31, 2022 in accordance with the financial reporting provisions of Section 42 of the Ontario Election Finances Act and the guidance issued by the Chief Electoral Officer.

These financial statements are prepared to assist the chief financial officer of the candidate to meet the requirements of the Ontario Election Finances Act and the guidance issued by the Chief Electoral Officer. As a result, the financial statements may not be suitable for another purpose.



Alan Lutyk, Licensed Public Accountant, CA

License Number: 1-16225

March 24, 2023

Stoney Creek, Ontario