

**Candidate Checklist**  
**March 3, 2020, Presidential Primary Election**

A number of documents must be filed at the local county elections office, and for some offices also at the Secretary of State's office, in order to qualify as a candidate for the statewide ballot. Below is an overview of the required documents for candidates running for President of the United States, United States Representative in Congress, State Senator, and Member of the State Assembly.

**President of the United States**

Candidates running for the office of President of the United States can have his or her name placed on the ballot as a presidential candidate in the March 3, 2020, Presidential Primary Election by two methods: 1) by determination of the Secretary of State that a person is a generally advocated for or recognized candidate, or 2) by circulating nomination papers.

Candidates who are seeking to be designated as a generally advocated for or recognized candidate must file the following with *the Elections Division of the Secretary of State's office in Sacramento*:

- Proof of Generally Advocated For or Recognized Candidate Form and supporting documentation
- Two (2) hardcopies of every income tax return filed with the Internal Revenue Service in the five (5) most recent taxable years (one copy without redactions and the other copy with specified redactions pursuant to Elections Code section 6884)
- Signed Income Tax Return Disclosure Consent Form

Candidates who are circulating nomination papers must file the following with the:

*Local county elections office in the county of the signer:*

- Nomination Petitions

*Elections Division of the Secretary of State's office in Sacramento:*

- Presidential Candidate Information Sheet
- Two (2) hardcopies of every income tax return filed with the Internal Revenue Service in the five (5) most recent taxable years (one copy without redactions and the other copy with specified redactions pursuant to Elections Code section 6884)
- Signed Income Tax Return Disclosure Consent Form

**Candidate Statements on the Secretary of State's Voter Information Guide Website**

Eligible presidential candidates may file a 250-word candidate statement with the Secretary of State for inclusion on the Secretary of State's website. The following information must be filed with *the Elections Division of the Secretary of State's office in Sacramento* and must be

received by December 27, 2019, in order for the statement to be published on the Secretary of State's Voter Information Guide Website:

- Candidate Statement (typewritten and double-spaced)
- Candidate Contact Information Form
- Signed Candidate Statement and Checklist Form

A candidate for President of the United States should contact the Federal Election Commission for a copy of the Federal Election Campaign Act, as amended, related regulations providing the filing requirements for reporting campaign contributions, and the forms on which to file. The Federal Election Commission can be contacted toll-free at (800) 424-9530 or at 1050 First Street, NE, Washington, D.C. 20463.

### **United States Representative in Congress**

Candidates running for the office of United States Representative in Congress must file the following with *their local county elections office* (if the candidate's residence is not in the district where the candidate is seeking office, file in the county elections office in the district where the candidate is seeking office):

- Filing fee payable to the Secretary of State and/or signatures in lieu of filing fee
- Declaration of Candidacy (includes the Oath of Office and Political Party Preference History)
- Nomination Petitions (in the county of the signer)
- Ballot Designation Worksheet
- Code of Fair Campaign Practices Statement (voluntary)

### **Candidate Statements in the County Voter Information Guide**

Candidates running for United States Representative in Congress may purchase space for a 250-word candidate statement in the county voter information guide of the county in their jurisdiction. In multi-jurisdictional contests, candidates must submit and purchase statements in each county in which they want their candidate statement to appear. For more information, please contact the corresponding county elections office.

A candidate for United States Representative in Congress should contact the Federal Election Commission for a copy of the Federal Election Campaign Act, as amended, related regulations providing the filing requirements for reporting campaign contributions, and the forms on which to file. The Federal Election Commission can be contacted toll-free at (800) 424-9530 or at 1050 First Street, NE, Washington, D.C. 20463.

### **State Senator and Member of the State Assembly**

Candidates running for the office of State Senator and Member of the State Assembly must file the following with *their local county elections office in their county of residence*:

- Filing fee payable to the Secretary of State and/or signatures in lieu of filing fee
- Declaration of Candidacy (includes the Oath of Office and Political Party Preference History)
- Nomination Petitions (in the county of the signer)
- Ballot Designation Worksheet
- Code of Fair Campaign Practices Statement (voluntary)

The following campaign finance forms should be filed with *the Political Reform Division of the Secretary of State's office in Sacramento*:

- Form 410 – Statement of Organization Recipient Committee  
(Required with Form 501, if candidate has received \$2,000 or more in a calendar year.)
- Form 460 – Recipient Committee Campaign Statement  
(Required with Form 501, if candidate has received \$2,000 or more in a calendar year.)
- Form 470 – Officeholder and Candidate Campaign Statement  
(Required with Form 501, if candidate has not received \$2,000 or more in a calendar year.)
- Form 501 – Candidate Intention Statement (includes voluntary expenditure limit designation)

### **Candidate Statements in the County Voter Information Guide**

Candidates running for State Senator or Member of the Assembly, who have agreed to voluntary expenditure limits on their Form 501, may purchase space for a 250-word candidate statement in the county voter information guide of the county in their jurisdiction. In multi-jurisdictional contests, candidates must submit and purchase statements in each county in which they want their candidate statement to appear. For more information, please contact the corresponding county elections office.

Candidates for State Senate and State Assembly should also visit the website of the Fair Political Practices Commission at [www.fppc.ca.gov](http://www.fppc.ca.gov) for the most recent copy of the Information Manual on Campaign Disclosure Provisions of the Political Reform Act.

Additional campaign finance information can also be found in Section 2-4.

#### **IMPORTANT NOTICE**

This candidate checklist is for general information only and does not have the force and effect of law, regulation, or rule. In case of conflict, the law, regulation, or rule will apply. The candidate should obtain the most up-to-date information available because of possible changes in law.