

THE METROPOLITAN GOVERNMENT OF NASHVILLE AND DAVIDSON COUNTY  
METROPOLITAN CLERK'S FORM –LC Rept v.2021

**ANNUAL LOBBYING AND EXPENSE REPORT**

Chapter 2.196 of the Metropolitan Code was amended in 2020. The amended language made changes to certain provisions of the Metropolitan Lobbyist Chapter of the Metropolitan Code, including those relating to the annual reporting of lobbying activities by a registered lobbyist.

PLEASE NOTE that as amended, the Metropolitan Lobbying Chapter requires every registered lobbyist to electronically file a sworn report regarding lobbying activities and expenses no later than January 31<sup>st</sup> for the previous calendar year. A person filing a report later than January 31<sup>st</sup> must pay a \$50 late filing fee. On March 1, lobbyists who have failed to file the sworn report or pay an applicable late fee will be reported to the Board of Ethical Conduct.

This report incorporates by reference all attached Schedules - A through D. Each client of a lobbyist must submit a sworn Schedule A and B to the lobbyist, which must be attached to the report when filed. Schedules C and D report the lobbyist's own lobbying activities and expenditures.

File by emailing the report to [metro.clerk@nashville.gov](mailto:metro.clerk@nashville.gov). If filing after January 31, please submit the report along with a check in the amount of \$50 paid to Metropolitan Government to:

Metropolitan Clerk, 1 Public Square, Suite 205, Nashville, TN 37201

Please refer to Chapter 2.196 of the Metropolitan Code, including Sections 2.196.020 and 2.196.060, for definitions and guidelines pertaining to this report.

**LOBBYIST INFORMATION:**

NAME \_\_\_\_\_

MAILING ADDRESS \_\_\_\_\_

PHONE \_\_\_\_\_

EMAIL \_\_\_\_\_

**THE CALENDAR YEAR HEREBY BEING REPORTED IS JANUARY 1 TO DECEMBER 31, 20\_\_\_\_.**

**“YOU” OR “YOUR” ON THIS FORM REFERS TO THE LOBBYIST.**

## **SECTION 1: GIFTS AND EXPENDITURES ON BEHALF OF A CLIENT**

### **SCHEDULE A. Gifts/Expenditures to Candidates for Public Office or Legislative Branch Officials on Behalf of a Client**

1. Report on **Schedule A**, an itemized list of each transaction for which you or anyone acting at your specific direction made a gift or expenditure of fifty dollars (\$50.00) or more on behalf of a client to benefit a candidate for public office, or an official in the legislative branch, or a member of the candidate’s or official’s staff or immediate family, or a campaign or testimonial committee established for the benefit of a candidate for public office or such official.
2. Report on **Schedule A**, an itemized list of each transaction for which you or anyone acting at your specific direction provided entertainment, food, refreshments, meals or beverages for Metro Council members on behalf of a client during the calendar year being reported that was not provided to the general public or at a regularly scheduled meeting of an established and recognized association, if the total aggregate cost for the year for any Council Member was more than \$25.00 for the food, refreshments, meals, or beverages provided or more than \$100.00 for the entertainment provided.

### **SCHEDULE B. Gifts/Expenditures to Executive Branch Officials on Behalf of a Client**

3. Report on **Schedule B**, an itemized list of each transaction for which you or anyone acting at your specific direction made a gift or expenditure of twenty-five dollars (\$25.00) or more on behalf of a client to benefit an official in the executive branch, or a member of the official’s staff or immediate family, or a campaign or testimonial committee established for the benefit of such official.

**SECTION 2: GIFTS AND EXPENDITURES ON LOBBYIST’S BEHALF**

**SCHEDULE C: Gifts/Expenditures to Candidates for Public Office or Legislative Branch Officials on Lobbyist’s Behalf**

- 4. Report on **Schedule C**, an itemized list of each transaction for which you or anyone acting at your specific direction made a gift or expenditure of fifty dollars (\$50.00) or more on your own behalf to benefit a candidate for public office, or a legislative branch official, or a member of the candidate’s or official’s staff or immediate family, or a campaign or testimonial committee established for the benefit of a candidate for public office or such official.
  
- 5. Report on **Schedule C**, an itemized list of each transaction for which you or anyone acting at your specific direction provided entertainment, food, refreshments, meals or beverages for Metro Council members on your own behalf during the calendar year being reported that was not provided to the general public or at a regularly scheduled meeting of an established and recognized association, if the total aggregate cost for the year for any Council Member was more than \$25.00 for the food, refreshments, meals, or beverages provided or more than \$100.00 for the entertainment provided.

**SCHEDULE D: Gifts/Expenditures to Executive Branch Officials on Lobbyist’s Behalf**

- 6. Report on **Schedule D**, an itemized list of each transaction for which you or anyone acting at your specific direction made a gift or expenditure of twenty-five dollars (\$25.00) or more on your own behalf to benefit an official in the executive branch, or a member of the official’s staff or immediate family, or a campaign or testimonial committee established for the benefit of such official.

**OATH**

**I DO SOLEMNLY SWEAR (OR AFFIRM) THAT THE INFORMATION PROVIDED IN THIS LOBBYING AND EXPENSE REPORT IS TRUE AND ACCURATE.**

**LOBBYIST NAME [PRINTED]** \_\_\_\_\_

**LOBBYIST SIGNATURE** \_\_\_\_\_

**DATE** \_\_\_\_\_

## SCHEDULE A

### GIFTS / EXPENDITURES TO CANDIDATES OR LEGISLATIVE BRANCH OFFICIALS ON BEHALF OF CLIENT

Notice to Lobbyist: Use a separate Schedule A for each Client for whom you were registered as a lobbyist during the report year.

LOBBYIST NAME \_\_\_\_\_

CLIENT NAME \_\_\_\_\_

	First name, last name and title of beneficiary	Indicate beneficiary's affiliation/relationship to legislative branch official/candidate	Circumstances of gift or expenditure, including, if applicable, for the provision of entertainment, food, refreshments, meals or beverages to member(s) of Metro Council	Amount	Date gift or expenditure was made
1.					
2.					
3.					
4.					

IF THERE ARE NO GIFTS OR EXPENDITURES TO REPORT, LOBBYIST SHALL SO INDICATE BY INITIALING HERE: \_\_\_\_\_

ATTESTATION BY CLIENT: I DO SOLEMNLY SWEAR (OR AFFIRM) THAT THE INFORMATION PROVIDED IN THIS SCHEDULE IS TRUE AND ACCURATE.

\_\_\_\_\_  
NAME AND TITLE (PRINT)

\_\_\_\_\_  
SIGNATURE

DATE: \_\_\_\_\_

## SCHEDULE B

### GIFTS / EXPENDITURES TO EXECUTIVE BRANCH OFFICIALS ON BEHALF OF A CLIENT

Notice to Lobbyist: Use a separate Schedule B for each Client for whom you were registered as a lobbyist during the report year.

LOBBYIST NAME \_\_\_\_\_

CLIENT NAME \_\_\_\_\_

	Full name and official title, including Metro department or agency, of beneficiary	Indicate beneficiary's affiliation/relationship to executive branch official	Amount	Circumstances of gift or expenditure	Date gift or expenditure was made
1.					
2.					
3.					
4.					

IF THERE ARE NO GIFTS OR EXPENDITURES TO REPORT, LOBBYIST SHALL SO INDICATE BY INITIALING HERE: \_\_\_\_\_

ATTESTATION BY CLIENT: I DO SOLEMNLY SWEAR (OR AFFIRM) THAT THE INFORMATION PROVIDED IN THIS SCHEDULE IS TRUE AND ACCURATE.

\_\_\_\_\_  
NAME AND TITLE (PRINT)

\_\_\_\_\_  
SIGNATURE

DATE: \_\_\_\_\_

## SCHEDULE C

### GIFTS / EXPENDITURES TO CANDIDATES AND LEGISLATIVE BRANCH OFFICIALS ON LOBBYIST'S OWN BEHALF

	First name, last name and title of beneficiary	Indicate beneficiary's affiliation/relationship to candidate/legislative branch official	Amount	Circumstances of gift or expenditure, including, if applicable, for the provision of entertainment, food, refreshments, meals or beverages to member(s) of Metro Council	Date gift or expenditure was made
1.					
2.					
3.					
4.					

Use the same format for additional sheets, if necessary.

IF THERE ARE NO GIFTS OR EXPENDITURES TO REPORT FOR THIS SCHEDULE, LOBBYIST SHALL SO INDICATE BY INITIALING HERE: \_\_\_\_\_

LOBBYIST NAME: \_\_\_\_\_

LOBBYIST SIGNATURE: \_\_\_\_\_

DATE REPORT SUBMITTED: \_\_\_\_\_

**SCHEDULE D**

**GIFTS / EXPENDITURES TO EXECUTIVE BRANCH OFFICIALS ON LOBBYIST'S OWN BEHALF**

	<b>First name, last name and title of beneficiary</b>	<b>Indicate beneficiary's affiliation/relationship to executive branch official</b>	<b>Amount</b>	<b>Circumstances of gift or expenditure</b>	<b>Date gift or expenditure was made</b>
1.					
2.					
3.					
4.					

Use the same format for additional sheets, if necessary.

IF THERE ARE NO GIFTS OR EXPENDITURES TO REPORT FOR THIS SCHEDULE, LOBBYIST SHALL SO INDICATE BY INITIALING HERE: \_\_\_\_\_

LOBBYIST NAME: \_\_\_\_\_

LOBBYIST SIGNATURE: \_\_\_\_\_

DATE REPORT SUBMITTED: \_\_\_\_\_