STATE OF CONNECTICUT
DEPARTMENT OF CONSUMER PROTECTION
SOLICITATION CAMPAIGN REPORT CPC-59
TELEPHONE: (860) 713-6190
EMAIL: dcp.charitiesenforcement@ct.gov

# SOLICITATION CAMPAIGN REPORT

General Instructions (see other side for field specific instructions): This form is to be completed by the Paid Solicitor. The Charity is then to review and sign the form confirming that they have 1) incorporated their expenses related to this solicitation on line 2 of the financial section and that they have retained the amount on line 3 of the financial section.
This completed form must be scanned and submitted by the solicitor online at www.elicense.ct.gov/.
To submit this report you must select and complete the **Solicitation Notice Report** 'Application'.

| **Paid Solicitor and Charity Information** | | |
|---|---|---|
| | **Paid Solicitor:** | **Charity:** |
| Organization Name: | | |
| Street Address | | |
| City, State, Zip | | |
| Registration Number: | | |

| **Solicitation Notice and Report Period** | | |
|---|---|---|
| Solicitation Notice Registration Number: | | |
| Enter the start and end date for this solicitation campaign (this may cover multiple years): | Start Date: ____/____/_______ | End Date: ____/____/_______ |
| Enter the start and end date for this Reporting Period (this should not exceed 12 months) | Start Date: ____/____/_______ | End Date: ____/____/_______ |
| Is this the final report for this solicitation campaign? | ☐ Yes ☐ No | |
| Is this a National Campaign or for Connecticut Only? | ☐ National Campaign ☐ Connecticut Only<br>(If you choose "National Campaign" than all financial amounts should be for the entire National Campaign and not for Connecticut Only) | |

| **Financial Report** | | |
|---|---|---|
| | **This Reporting Period Only** | **Cumulative for the Entire Campaign** |
| 1. Gross Revenue (include expenses and amount paid to the charity) | | |
| 2.Expense (include any expenses for this campaign paid by the charity) | | |
| 3. Amount the Charity gets to retain (enter a negative amount if the charity paid funds to or owes funds to the paid solicitor) | | |
| 4. Net Balance (line 1 less line 2 less line 3) | | |
| 5. Uncollected Pledges | | |

| **Certification** | | | |
|---|---|---|---|
| | **Paid Solicitor Representative** | **Charitable Organization Representative 1** | **Charitable Organization Representative 2** |
| | I certify that all information is true and complete to the best of my abilities:<br>☐ Yes ☐ No | I certify that all information is true and complete to the best of my abilities and that my charity has received for its use the amount on line 3 of the financial report section:<br>☐ Yes ☐ No | I certify that all information is true and complete to the best of my abilities and that my charity has received for its use the amount on line 3 of the financial report section:<br>☐ Yes ☐ No |
| Print Name | | | |
| Title | | | |
| Date: | ____/____/_______ | ____/____/_______ | ____/____/_______ |
| Signature | | | |

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# SOLICITATION CAMPAIGN REPORT – INSTRUCTIONS

## Overview

The Paid Solicitor completes this form annually at the anniversary of the start of the solicitation campaign and when the solicitation has been completed. You must provide financial results for both the period you are reporting and cumulative amounts for the entire campaign. Reports are due within 90 days of the anniversary of the start date of the solicitation campaign and at the end date of the campaign.

***NOTE: Paper Copies will no longer be accepted after 7/1/2017. If you fail to submit your report online for reports due or submitted after 7/1/2017 you will be considered in default of the Solicitation Notice obligations.***

## Notes on Financial Information:

All Financial data is reported on a cash basis. All financial report categories are reported both for the campaign period and the cumulative period (from the date of the start of the campaign to the end of the report period). If this campaign is part of a National Solicitation Campaign then all amounts should reflect the national numbers.

1. Gross Revenue: The total money collected as a result of the campaign. This is the gross amount and is reported without deducting any expenses or amounts provided to the charity.
2. Expenses must include:
   a. Any amount that the charity spends directly to a third party to support the campaign.
   b. Any amounts retained or paid to the Paid Solicitor (do not include amounts incurred by the solicitor but not yet paid to the solicitor).
3. Amount the Charity gets to retain: This is the net amount provided to the charity and available for their use. Show a negative amount only if the charity paid or has funds due to the Paid Solicitor).
4. Net Balance (line 1 less line 2 less line 3) - When entering this amount online you will be asked to explain the distribution of this amount (if it is positive) or whether the charity incurs this loss (if the amount is negative).
5. Uncollected Pledges – Any amount promised by an individual but uncollected.

## Recommended Steps:

1. The Paid Solicitor contacts the charity and requests any amounts that they have paid to a third party during reporting period to support this campaign.
2. The paid solicitor completes the form and gathers information that details the expenses in line 3 of the financial information.
3. The Paid Solicitor signs and certifies the accuracy of the form and gathers the certification and signatures of two representatives of the charity. The paid Solicitor scans the final, signed report.
4. The paid solicitor goes online to https://www.elicense.ct.gov/ and then
   a. Logs in with the Paid Solicitor's ID and Password
   b. Selects the new application (Solicitation Report under Charities & Solicitation)
   c. Completes and submits the online version (you will be required to upload both the signed copy of the report and the itemized expenses.

## How to Look Up the Registration Numbers

1. Goes online to https://www.elicense.ct.gov/
2. Select "Look Up a License"
3. In the first box the right of License Number enter or select "PSR" - or – select "Paid Solicitor Registration" from the License Type box.
4. Enter the Paid Solicitor 's name in the Business Name/DBA field (You can enter the start of the name if you desire)
5. Select the Search button
6. The Registration Number for the Paid Solicitor will be on this page. Select the Detail button for the appropriate record.
7. The Registration Numbers for the solicitation notices and the charities will be on this page.