



Getting Started -- Local Candidates

Organizing a Candidate's Committee for: Municipal Candidate

Step One: Setting Up Your Candidate's Committee with OCPF

- Appoint a Chairman and a [Treasurer](#) for your committee.
- Download and complete the [Form CPF M 101](#): Statement of organization for a municipal candidate's committee.
- Although your reporting will be done on paper, you may still want to download and install [Reporter 5](#), OCPF's free reporting software, to prepare and print your campaign finance reports.

Step Two: Setting Up Your Bank Account

- Your bank may ask you for a copy of your completed Statement of Organization (CPF M 101).
- Candidates should contact their banks in advance for further information about the bank's requirements to open a campaign account. Unlike the Depository system, the campaign finance law does not have any special requirements about the type of account you open and your bank will not have any campaign finance reporting requirements.
- Many banks require committees to obtain an Employer Identification Number (EIN) to open a campaign account. The IRS allows you to apply for an [EIN](#) online.
- Candidates and committees should also consult the [Massachusetts Department of Revenue](#) for information on any state tax requirements that may be applicable.
- Additional Help / Information:
 - OCPF Memorandum [M-89-02](#): Information on obtaining a Federal ID number and filing tax returns for political committees.

Step Three: Commence Recordkeeping and Reporting

- Once your committee is established, you will need to start reporting your campaign finance activity. Your reports will be submitted to your local election official. You will need to contact your local election official for your reporting schedule.
- You can either use the software to prepare your campaign finance reports or use this form: [CPF M 102](#): Municipal Campaign Finance Report ([Editable version](#)) ([Instructions](#)).
- Candidates and committees must maintain detailed accounts of all contributions received and all expenditures made. These records must be kept separate and distinct from any other accounts or records and must be preserved for 6 years from the relevant election.
- [Video](#): **How to file a campaign finance report using Web Reporter** (Mayoral candidates in cities with populations of 40,000 to 100,000)

- [Video](#): **How to file an amendment using Reporter 5** (Mayoral candidates in cities with populations of 40,000 to 100,000)
- [Video](#): **How to file a late contribution report using Web Reporter** (Mayoral candidates in cities with populations of 40,000 to 100,000)
- [Video](#): **How to file a late contribution report using Reporter 5** (Mayoral candidates in cities with populations of 40,000 to 100,000)

- Additional Help / Information:
 - Campaign Finance [Guide](#) for Candidates for Municipal Office.
 - [Common errors](#) to avoid when filing.
 - Contribution Limits [Chart](#).
 - Public Employees and Campaigns: A [Fact Sheet](#).
 - OCPF Guide: [Reporting Out-of-Pocket Campaign Expenditures](#).

http://www.mass.gov/ocpf/getting_started.htm