



CAMPAIGN FINANCIAL DISCLOSURE STATEMENT

For State and Local Candidates

For Single-Candidate Committees

ORIGINAL DOCUMENT
PHOTOCOPY CANNOT BE
ACCEPTED TCA 2-5-102

1. Date: 7-29-26 2.a. Candidate or Committee Name: Joseph Lee III for Trustee
2.b. If Committee, Name of Candidate: Joseph Lee III 3. Election Date: Aug 6, 2026
4. Campaign Address: 7351 Cotton Plant Cove
City: Memphis State: TN Zip Code: 38119 Phone: (901) 585-2055
5. Candidate Home Address: 7351 Cotton Plant Cove
City: Memphis State: TN Zip Code: 38119 Phone: (901) 585-2055
Candidate Email Address: jlee3339@hotmail.com
6. Office Sought: (include district number, if applicable) Shelby County Trustee
7. Name of Political Treasurer (may be candidate): Mona R. Lee
Political Treasurer Email Address: monalee22@yahoo.com

8. Category or Report: (check one)

- ☐ First Quarter ☐ Second Quarter ☐ Third Quarter ☐ Fourth Quarter ☐ Pre-Primary ☒ Pre-General
☐ Mid-Year Supplemental ☐ Year-End Supplemental ☐ Runoff Election

9. Reporting Period: Start Date: 7-1-2026 End Date: 7-27-2026

10. Detailed Disclosure: (Check one)

- ☐ This campaign is exempt from detailed disclosures because contributions (including in-kind) received total \$1,000 or less AND expenditures total \$1,000 or less for this reporting period. (Complete items 12.d., 12.e., and 12.f.)
☐ This campaign is required to file a detailed financial disclosure because contributions (including in-kind) received total more than \$1,000 and/or expenditures total more than \$1,000 for this reporting period.

11. I/we do solemnly swear or affirm that the information contained in this campaign financial disclosure report is true and that this report is an accurate accounting of campaign contributions and expenditures required to be reported by the candidate committee by the Campaign Financial Disclosure Act. Additionally, I/we swear or affirm that no campaign contributions have been expended for the personal financial benefit of the candidate or for any other nonpolitical purpose as defined by the federal internal revenue code.

<u>Joseph Lee III</u>	<u>7/29/26</u>	<u>Mona R. Lee</u>	<u>7-29-26</u>
Candidate Signature	Date	Political Treasurer Signature	Date
<u>Phyllis A. Clark</u>	<u>7-29-26</u>	<u>Phyllis A. Clark</u>	<u>7-29-26</u>
Witness Signature	Date	Witness Signature	Date

12. Summary:

- a. Balance On Hand Last Report \$ 2,617.03
b. Total Receipts This Period \$ 200.00
c. Total Disbursements This Period \$ 1302.00
d. Balance On Hand (12.a. plus 12.b. minus 12.c.) \$ 1515.03
e. Total Loans Outstanding \$ 40,635.54
f. Total Obligations Outstanding \$ 0

SUMMARY PAGE - CANDIDATE

ORIGINAL DOCUMENT
PHOTOCOPY CANNOT BE
ACCEPTED TCA 2-5-102

13. Name of Candidate or Committee: Joseph Lec III for Trustee

14. Reporting Period: Start Date: 7-1-2026 End Date: 7-27-2026

15. Receipts:

- a. Unitemized Contributions (\$100 or less from each source this period) \$ 0
(Note: Effective January 16, 2023, Unitemized Contributions are capped at \$2,000. See *Instructions* for more information.)
- b. Itemized Contributions (over \$100 from each source this period) \$ 200.00
- c. Loans Received This Reporting Period \$ 0
- d. Interest Received This Reporting Period \$ 0
- e. Total Receipts (add 15.a., 15.b., 15.c., and 15.d.) (must be shown in item 12.b.) \$ 200.00

16. Disbursements:

- a. Total Expenditures (other than loan payments) \$ 1,302.00
(Note: Effective January 16, 2023, all expenditures must be itemized.)
- b. Loan Repayments Made This Period \$ 0
- c. Total Obligation Payments Made This Period \$ 0
- d. Total Disbursements (add 16.a. and 16.b.) (must be shown in item 12.c.) \$ 1,302.00

17. In-Kind Contributions:

- a. Unitemized In-Kind Contributions Received This Period \$ 0
- b. Itemized In-Kind Contributions Received This Period \$ 0
- c. Total In-Kind Contributions Received This Period \$ 0

18. Obligations:

- a. Total Obligations Outstanding (must be shown in item 12.f.) \$ _____

ITEMIZED STATEMENT OF CONTRIBUTIONS - CANDIDATE

1. Candidate or Committee Name: Joseph A. E. H. for Trustee

2. Reporting Period: Start Date: 7-1-2026 End Date: 7-27-2026

3. Total campaign contributions from preceding page (enter \$0 if first page) \$ _____

COMPLETE THE APPROPRIATE ITEMS FOR EACH ITEMIZED CONTRIBUTION.

Business or Organization Name: _____ OR

First Name: John Middle Name: _____ Last Name: Robilio

Address: 195 Yates Road City: Memphis State: TN Zip Code: 38120

Occupation: Retired Employer: _____

Contribution Received For: ☐ Primary Election ☐ General Election ☐ Runoff (Local Elections Only)

Amount of Contribution: \$ 500 Date of Contribution: 7-7-2026 Aggregate This Election: \$ _____

Business or Organization Name: _____ OR

First Name: Alicia Middle Name: _____ Last Name: Lindsey

Address: 680 W. Holmes Rd. City: Memphis State: TN Zip Code: 38109

Occupation: Sheriff Office - CFO Employer: Shelby Co. Government

Contribution Received For: ☐ Primary Election ☐ General Election ☐ Runoff (Local Elections Only)

Amount of Contribution: \$ 150 Date of Contribution: 7-17-26 Aggregate This Election: \$ _____

Business or Organization Name: _____ OR

First Name: _____ Middle Name: _____ Last Name: _____

Address: _____ City: _____ State: _____ Zip Code: _____

Occupation: _____ Employer: _____

Contribution Received For: ☐ Primary Election ☐ General Election ☐ Runoff (Local Elections Only)

Amount of Contribution: \$ _____ Date of Contribution: _____ Aggregate This Election: \$ _____

Business or Organization Name: _____ OR

First Name: _____ Middle Name: _____ Last Name: _____

Address: _____ City: _____ State: _____ Zip Code: _____

Occupation: _____ Employer: _____

Contribution Received For: ☐ Primary Election ☐ General Election ☐ Runoff (Local Elections Only)

Amount of Contribution: \$ _____ Date of Contribution: _____ Aggregate This Election: \$ _____

Total Contributions: \$ 200

(Carry forward to the next page if additional pages of this form are used. If this is the last page of contributions, this amount must be shown in the summary on first page.)

ITEMIZED STATEMENT OF EXPENDITURES - CANDIDATE

1. Candidate or Committee Name: Joseph Lee III for Trustee
2. Reporting Period: Start Date: 7-1-2026 End Date: 7-27-2026
3. Total campaign expenditures from preceding page (enter \$0 if first page) \$ 0

COMPLETE THE APPROPRIATE ITEMS FOR EACH EXPENDITURE. All expenditures must be itemized. If the expenditure is an in-kind contribution to a candidate, please remember to include the purpose of the expenditure (e.g., postage, printing, etc.) along with the candidate's name in the purpose of the expenditure section.

Business or Organization Name: 1st Horizon Bank OR
First Name: _____ Middle Name: _____ Last Name: _____
Address: P.O. Box 84 City: Memphis State: TN Zip Code: 38101
Purpose of Expenditure: Bank fee
Amount of Expenditure: \$ 2.00 Date of Expenditure: \$ 7/10/26

Business or Organization Name: Latorisha Buford (for Cash Out) OR
First Name: Sade Middle Name: _____ Last Name: Bradley
Address: requested City: Memphis State: TN Zip Code: _____
Purpose of Expenditure: Campaign Contribution
Amount of Expenditure: \$ 150.00 Date of Expenditure: \$ 7-13-2026

Business or Organization Name: _____ OR
First Name: Julian Middle Name: _____ Last Name: Hudson
Address: 88 W. Armstrong Rd. City: Memphis State: TN Zip Code: 38109
Purpose of Expenditure: Campaign Helper
Amount of Expenditure: \$ 150.00 Date of Expenditure: \$ 7-13-26

Business or Organization Name: ACT BLUE - Democratic Party Donation (Shelby Co.) OR
First Name: _____ Middle Name: _____ Last Name: _____
Address: _____ City: _____ State: _____ Zip Code: _____
Purpose of Expenditure: Democrate Party - Donation - Campaign Advertising
Amount of Expenditure: \$ 400.00 Date of Expenditure: \$ 7-14-2026

Business or Organization Name: ACT Blue - Democratic - Shelby OR
First Name: _____ Middle Name: _____ Last Name: _____
Address: _____ City: _____ State: _____ Zip Code: _____
Purpose of Expenditure: Democratic Party - Donation - Campaign Advertising
Amount of Expenditure: \$ 600.00 Date of Expenditure: \$ 7-15-2026

Total Expenditures: \$ 1,302.00
(Carry forward to the next page if additional pages of this form are used. If this is the last page of expenditures, this amount must be shown in the summary on first page.)

JLH
etc

ITEMIZED STATEMENT OF LOANS - CANDIDATE

- Candidate or Committee Name: Joseph Lee III for Trustee
- Reporting Period: Start Date: 7-1-2026 End Date: 7-27-2026
- Complete the appropriate items for each loan totaling more than one hundred dollars (\$100).

Complete the following for the source of each loan received and/or outstanding during the period.

Business or Organization Name: Joseph Lee III for Trustee OR
First Name: Joseph Middle Name: _____ Last Name: Lee III
Address: 7351 Cotton Plant Cove City: Memphis State: TN Zip Code: 38119
Outstanding Loan Balance (Beginning) \$ 40,635.54
Loans Received \$ 0
Loan Payments \$ 0
Outstanding Loan (End)..... \$ 40,635.54
Loan Received For: ☐ Primary Election ☐ General Election ☐ Runoff (Local Elections Only)
Date of Loan: _____

List all endorsers or guarantors for above loan (If more space is needed, please attach additional pages.)

Business or Organization Name: _____ OR
First Name: _____ Middle Name: _____ Last Name: _____
Address: _____ City: _____ State: _____ Zip Code: _____
Amount Guaranteed Outstanding: \$ _____

Business or Organization Name: _____ OR
First Name: _____ Middle Name: _____ Last Name: _____
Address: _____ City: _____ State: _____ Zip Code: _____
Amount Guaranteed Outstanding: \$ _____

Business or Organization Name: _____ OR
First Name: _____ Middle Name: _____ Last Name: _____
Address: _____ City: _____ State: _____ Zip Code: _____
Amount Guaranteed Outstanding: \$ _____

Business or Organization Name: _____ OR
First Name: _____ Middle Name: _____ Last Name: _____
Address: _____ City: _____ State: _____ Zip Code: _____
Amount Guaranteed Outstanding: \$ _____

Totals for all loans (Complete this page for each outstanding loan during the period. Complete this section only on last page of loans. Total loans received and loan payments should be shown on summary page. Outstanding loan balance should be shown on front page.)

Balance (Beginning) \$ 40,635.54
Loans Received \$ 0
Loan Payments \$ 0
Outstanding Loan (End)..... \$ 40,635.54

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ITEMIZED STATEMENT OF IN-KIND CONTRIBUTIONS - CANDIDATE

1. Candidate or Committee Name: Joseph Lee III for Trustee
2. Reporting Period: Start Date: 7-1-26 End Date: 7-27-26
3. Total in-kind contributions from preceding page (enter \$0 if first page) \$ 0

COMPLETE THE APPROPRIATE ITEMS FOR EACH IN-KIND CONTRIBUTION. In-kind contributions totaling more than one hundred dollars (\$100) from any contributor during the period must be reported.

Business or Organization Name: _____ OR
First Name: _____ Middle Name: _____ Last Name: _____
Address: _____ City: _____ State: _____ Zip Code: _____
Occupation: _____ Employer: _____
In-Kind Contribution Received For: ☐ Primary Election ☐ General Election ☐ Runoff (Local Elections Only)
In-Kind Contribution Value: \$ _____ In-Kind Contribution Date: _____ Aggregate This Election: \$ _____
Description of In-Kind Contribution: _____

Business or Organization Name: _____ OR
First Name: _____ Middle Name: _____ Last Name: _____
Address: _____ City: _____ State: _____ Zip Code: _____
Occupation: _____ Employer: _____
In-Kind Contribution Received For: ☐ Primary Election ☐ General Election ☐ Runoff (Local Elections Only)
In-Kind Contribution Value: \$ _____ In-Kind Contribution Date: _____ Aggregate This Election: \$ _____
Description of In-Kind Contribution: _____

Business or Organization Name: _____ OR
First Name: _____ Middle Name: _____ Last Name: _____
Address: _____ City: _____ State: _____ Zip Code: _____
Occupation: _____ Employer: _____
In-Kind Contribution Received For: ☐ Primary Election ☐ General Election ☐ Runoff (Local Elections Only)
In-Kind Contribution Value: \$ _____ In-Kind Contribution Date: _____ Aggregate This Election: \$ _____
Description of In-Kind Contribution: _____

Business or Organization Name: _____ OR
First Name: _____ Middle Name: _____ Last Name: _____
Address: _____ City: _____ State: _____ Zip Code: _____
Occupation: _____ Employer: _____
In-Kind Contribution Received For: ☐ Primary Election ☐ General Election ☐ Runoff (Local Elections Only)
In-Kind Contribution Value: \$ _____ In-Kind Contribution Date: _____ Aggregate This Election: \$ _____
Description of In-Kind Contribution: _____

Total In-Kind Contributions: \$ 0
(Carry forward to the next page if additional pages of this form are used. If this is the last page of in-kind contributions, this amount must be shown in the summary on first page.)