





# Financial Relationship Disclosure Form

Program planners/instructional personnel have a relevant financial relationship if that relationship could influence the information presented in the course and could be perceived as a conflict of interest by learners.

**Complete and copy this page as many times as necessary to provide information regarding each of your relevant financial relationships.**

**Planner/Presenter Name:** \_\_\_\_\_

**Financial Relationship (Name of Company/Organization):** \_\_\_\_\_

**Date form Completed:** \_\_\_\_\_

**What was received? (check all that apply)**

- Salary
- Consulting fee
- Intellectual property rights
- Speaking fee
- Royalty
- Honoraria
- Hold patent on equipment
- In kind
- Grants
- Gift
- Ownership interest (e.g., stocks, stock options, or other ownership interest excluding diversified mutual funds)
- Other financial benefit (please describe): \_\_\_\_\_

**For what role? (check all that apply)**

- Employment \_\_\_\_\_
- Management position
- Teaching and speaking
- Board membership
- Ownership
- Consulting
- Membership on advisory committee or review panels
- Independent Contractor (including contracted research)
- Other activities (please describe): \_\_\_\_\_



# **Non-Financial Relationship Disclosure Form**

Program planners/instructional personnel have a relevant non-financial relationship if that relationship could influence the information presented in the course and could be perceived as a conflict of interest by learners. Complete and copy this page as many times as necessary to provide information regarding each of your relevant financial relationships.

**Planner/Presenter Name:**

\_\_\_\_\_

**Non-Financial Relationship (Name of Company/Organization):**

\_\_\_\_\_

**Date form Completed:** \_\_\_\_\_

**What is the nature of the non-financial relationship? (complete all that apply)**

- \_\_\_\_\_ Personal (please describe): \_\_\_\_\_
- \_\_\_\_\_ Professional (please describe): \_\_\_\_\_
- \_\_\_\_\_ Political (please describe): \_\_\_\_\_
- \_\_\_\_\_ Institutional (please describe): \_\_\_\_\_
- \_\_\_\_\_ Religious (please describe): \_\_\_\_\_
- \_\_\_\_\_ Personal interest (please describe): \_\_\_\_\_
- \_\_\_\_\_ Bias (please describe): \_\_\_\_\_
- \_\_\_\_\_ Other relationship (please describe): \_\_\_\_\_

**For what role? (Check all that apply)**

- \_\_\_\_\_ Volunteer employment
- \_\_\_\_\_ Volunteer teaching and speaking
- \_\_\_\_\_ Board membership
- \_\_\_\_\_ Volunteer consulting
- \_\_\_\_\_ Volunteer membership on advisory committee or review panels
- \_\_\_\_\_ Other volunteer activities (please describe):

\_\_\_\_\_