



## Financial Relationship Disclosure Form

**Copy this page as many times as you need to complete information regarding each of your relevant financial relationships.** 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.

Planner/Presenter name: \_\_\_\_\_

Financial relationship with (name of Company/Organization): \_\_\_\_\_

Date form completed: \_\_\_\_\_

### What was received? (Check all that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> Salary   | <input type="checkbox"/> In kind   |
| <input type="checkbox"/> Consulting fee                                   | <input type="checkbox"/> Grants  |
| <input type="checkbox"/> Intellectual property rights                     | <input type="checkbox"/> Gift  |
| <input type="checkbox"/> Speaking fee                                     | <input type="checkbox"/> Ownership interest (e.g., stocks, stock options or other ownership interest excluding diversified mutual funds) |
| <input type="checkbox"/> Royalty  |  |
| <input type="checkbox"/> Honoraria  |  |
| <input type="checkbox"/> Hold patent on equipment                         |  |
| <input type="checkbox"/> 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

**Copy this page as many times as you need to complete information regarding each of your relevant non-financial relationships.** 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.

Planner/Presenter name: \_\_\_\_\_

Non-financial relationship with (name of Company/Organization/Institution):

\_\_\_\_\_

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?**

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