



Disclosure of Financial Relationships

Title of Continuing Education: _____ Date: _____

Location of Education: _____

Name of Individual **with credentials**: _____

Employer/Organization: _____ Phone: _____

Email address: _____

As a prospective planner or faculty member, we would like to ask for your help in protecting our learning environment from industry influence. The JA Standards for Integrity and Independence require that we disqualify individuals who refuse to provide this information from involvement in the planning and implementation of accredited continuing education. Thank you for your diligence and assistance.

Individual's prospective role(s) in education (choose all that apply)

Planner [Examples: planning committee, staff involved in choosing topics, faculty or content]

Teacher, Instructor

Reviewer

Faculty Author, Writer

Other _____

If you have questions, please contact us at this email address. Otherwise, please complete the information below and return it to _____ by _____.

To be completed by Planner, Faculty, or Others Who May Control Educational Content:

Please disclose **all financial relationships** that you have had in the past 24 months with ineligible companies (see definition below). For each financial relationship, enter the name of the ineligible company and the nature of the financial relationship(s). There is no minimum financial threshold; we ask that you disclose all financial relationships, regardless of the amount, with ineligible companies. You should disclose all financial relationships regardless of the potential relevance of each relationship to the education.

Enter the Name of Ineligible Company	Enter the Nature of Financial Relationship	Has the Relationship Ended?
An ineligible company is any entity whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.	Examples of financial relationships include employee, researcher, consultant, advisor, speaker, independent contractor (including contracted research), royalties or patent beneficiary, executive role, and ownership interest. Individual stocks and stock options should be disclosed; diversified mutual funds do not need to be disclosed. Research funding from ineligible companies should be disclosed by the principal or named investigator even if that individual's institution receives the research grant and manages the funds.	If the financial relationship existed during the last 24 months, but has now ended, please check the box in this column. This will help the education staff determine if any mitigation steps need to be taken.
Example: AB Company	Consultant	

___ In the past 24 months, I have not had any financial relationships with any ineligible companies.

I attest that the above information is correct as of this date of submission by signing and dating below.

Signature with Credentials (Electronic signature accepted)

Date: _____