

**Penn Medicine Center for Evidence-based Practice (CEP)**  
**Disclosure of Relevant Financial Relationships**

Name \_\_\_\_\_

Date \_\_\_\_\_

\_\_\_\_\_ I do not have any relevant financial relationships with commercial interests.

\_\_\_\_\_ All of my relevant financial relationships with commercial interests are listed below.

Company or other commercial interest	What was received	For what role?

\_\_\_\_\_ None of my immediate family members have any relevant financial relationships with commercial interests.

\_\_\_\_\_ All of my immediate family members' relevant financial relationships with commercial interests are listed below.

Family member	Company or other commercial interest	What was received	For what role?

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***Example terminology***

<i>What was received</i>	<i>Salary (e.g. research funding, fellowship, employment), honoraria (i.e. one-time payments), consulting fee, ownership interest (e.g. stocks, stock options or other ownership interest, excluding diversified mutual funds), royalty payments, intellectual property rights, outstanding loan, personal gifts, or other financial benefit.</i> <i>Unless otherwise requested, CEP does NOT want to know how much you received.</i>
<i>Role(s)</i>	<i>Employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and 'other activities' (please specify).</i>

## **Glossary of Terms**

### **Commercial Interest**

For the purposes of this document, a “commercial interest” is any proprietary entity producing health care goods or services, with the exemption of non-profit or government organizations and non-health care related companies.

### **Financial relationships**

Financial relationships are those relationships in which the individual benefits by receiving a salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (e.g., stocks, stock options or other ownership interest, excluding diversified mutual funds), or other financial benefit. Financial benefits are usually associated with roles such as employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and other activities from which remuneration is received, or expected. CEP considers relationships of the person involved in the CEP process to include financial relationships of a spouse or partner.

### **Relevant financial relationships**

CEP focuses on financial relationships with commercial interests in the 12-month period preceding the time that the individual is being asked to assume a role in the CEP process. CEP has not set a minimal dollar amount for relationships to be significant. Inherent in any amount is the incentive to maintain or increase the value of the relationship. CEP defines “relevant financial relationships” as financial relationships in any amount occurring within the past 12 months that create a conflict of interest.

### **Conflict of Interest**

Circumstances create a conflict of interest when an individual has an opportunity to affect CEP content about products or services of a commercial interest with which he/she has a financial relationship.