

COPE offers this document as a template for COPE CE Administrators/Providers to use for obtaining financial relationship information. All elements of this form must be included with the course submission should the Administrator/Provider submit the course on behalf of the Instructor. With modification it can be used for lecturers, authors and members of planning committees. NOTE: COPE CE Administrators/Providers are not required or expected to use this document; it only serves as an example.

Disclosure of Relevant Financial Relationships

Name: [INSERT NAME]

Activity Title: [INSERT COPE ACCREDITED CE ACTIVITY NAME]

Content of Activity: [INSERT SUMMARY OF CONTENT]

Date of Activity: [INSERT DATE OF ACTIVITY]

First, list the names of proprietary entities producing health care goods or services, consumed by, or used on patients, with the exemption of non-profit or government organizations and non-health care related companies with which you or your spouse/partner have, or have had, a relevant financial relationship within the past 12 months. For this purpose we consider the relevant financial relationships of your spouse or partner that you are aware of to be yours.

Second, describe what you or your spouse/partner received (ex. Salary, honorarium, etc.). [COPE CE ADMINISTRATOR/PROVIDER NAME] does not want to know how much you received.

Third, describe your role.

Commercial Interest	Nature of Relevant Financial Relationship (include all that apply)	
	What was Received	For What Role?
<i>Example: Company 'X'</i>	<i>Honorarium</i>	<i>Speaker</i>

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

My signature on this document confirms all of the following:

I have read and will comply with the COPE requirements for course qualification. I further agree to notify COPE in writing should any information provided, including financial/proprietary information, change at any time during the three year qualification period of this course.

I agree that I will keep my presentation free from commercial interest or bias. I will maintain independent control over the content of my presentation, so that it is balanced, objective, presented with scientific rigor and not be for the purpose of promoting products, equipment, etc. (Therefore, my presentation should not be perceived by attendees as a commercial.) I further agree that I will not change the basic content of my presentation following approval.

I agree to disclose to the audience the existence of any significant financial/professional relationships with the manufacturer(s) of any commercial product(s) and/or the provider(s) of any commercial service(s) discussed in the educational presentation. (Said relationships can include such things as grant/research support, employment, consulting and/or speakers bureau arrangements, major stock ownership, etc.) I will disclose any of these relationships, whether or not there is direct commercial support for the CE activity. This disclosure is made to provide the audience the information on which they can make judgments as to a presenter's objectivity.

I agree to disclose the attendees; a) when products or procedures being discussed are off label, unlabeled, experimental, and/or investigational (not FDA approved); b) any limitations on the information that is presented, such as data that are preliminary or that represent ongoing research, interim analyses, and/or unsupported opinion.

I agree I have an ethical responsibility to make appropriate decisions related to my presentation, and all issues involving financial remuneration. (Considerations in this regard could include kickback schemes or multiple remunerations for a single event.)

Signature:

Date:

Example terminology:

What was received: 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.

Role(s): 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).