**Financial Interests Report**
(submitted pursuant to the requirements of the [institution name here](#) Conflict of Interest policy)

Name: ____________________________________________________________

I am reporting on activities:
- ☐ for the year ______
- ☐ as an addendum to my most recent report

| ☐ yes | ☐ no | 1. Compensation (including travel expenses). Have you or a member of your Family received compensation from a for-profit entity for activities such as consulting, expert witness, advisory board membership, and the like? If yes, furnish information on an additional page. |
| ☐ yes | ☐ no | 2. Equity. Do you or a member of your family own stock or hold stock options with a publicly-traded or privately-owned entity? If yes, furnish information on an additional page. |
| ☐ yes | ☐ no | 3. Role. Do you or a member of your family serve as a director, trustee, officer or other key employee in a for-profit corporation, partnership, business, or other entity outside of the [institution name here](#). If yes, furnish information on an additional page. |
| ☐ yes | ☐ no | 4. Intellectual Property. Do you or a member of your family have rights to and/or receive royalties from intellectual property (including, patents copyrights and trademarks but excluding academic or scholarly works) licensed to and/or owned by a for-profit entity? Do NOT include intellectual property owned or managed by the [institution name here](#). If yes, furnish information on an additional page. |

Certification:

I have read and understand the [institution name here](#)’s policy on Conflict of Interest in PHS Funded Projects and have completed this report to the best of knowledge and belief. If required, I will comply with any conditions or restrictions imposed by the [institution name here](#) to manage any real or perceived conflicts. Should my outside financial or managerial interests, or those of my Family, change in a way that results in different answers to any of the questions asked in this report, I agree to submit a revision.

_____________________________  ________________________________
(date)  (signature)
Addition to Financial Interests Report of: ____________________________________________

Reporting for  ☐ self  ☐ family member: name: ___________________________________ relationship: ____________________________________

Name of External Entity: _______________________________________________________
Address of External Entity: ____________________________________________________

Type of external relationship: (check all that apply)

☐ Consultant  ☐ Speaker  ☐ Advisory Board or Committee
☐ Equity Holdings  ☐ Governing Board or Officer  ☐ Intellectual Property Rights
☐ Royalty Income  ☐ Other (describe below)

Amount of compensation or financial interest in reporting period: $ ______________________

If travel paid by entity:

Destination: ___________________________________________________________
Amount: $ ______________________

Comments or explanatory information: