

# FLORIDA ATLANTIC UNIVERSITY

## REPORT OF SPECIFIED INTEREST

An employee is required under Florida law, University rules, and/or provisions of a Collective Bargaining Agreement to disclose contractual relationships, including material financial and managerial interests, with an entity that proposes to do business with the University prior to such business being conducted. In the case of material financial and managerial interests, the information required extends to the spouse and/or child of the employee and, for managerial interests, to relatives.

Please note that an employee must submit the disclosure information and obtain required approvals on an annual basis.

Specific Activity - Please check the appropriate interest and/or activities and provide the information requested. In the case of numbers one (1) and two (2) below, the declaration applies to immediate family and to certain relatives.

- \_\_\_\_\_ 1. **Material Financial Interest**, i.e., direct or indirect ownership of more than five (5) percent of the total assets or capital stock of the business entity. Name and location of business entity, the nature of the financial interest (proprietorship, partnership, interest and/or stock ownership, etc.), brief description of business to be conducted with the University, the department/unit from which business is to be solicited, and the source of funding (if applicable) to be used to pay for the product/services.
- \_\_\_\_\_ 2. **Managerial Interest**, i.e. officer, director, partner, proprietor, etc., of the business entity. Name and location of business entity, the nature of managerial interest, brief description of business to be conducted with the University, the department/unit from which business is to be solicited, and the source of funding (if applicable) to be used to pay for the product/service.
- \_\_\_\_\_ 3. **Employment or Other Contractual Relationship**. Name and location of business entity or agency, the nature of employment and/or other contractual relationship, brief description of business to be conducted with the University, the department/unit from which business is to be solicited, and the source of funding (if applicable) to be used to pay for the product/service.
- \_\_\_\_\_ 4. **Textbook/Instructional Materials**. Name of textbook/instructional materials and publisher and brief description of use at the University.
- \_\_\_\_\_ 5. **Candidate for Political Office**. Name of office, dates of campaign, length of term, if elected.

**Any report that is to continue beyond June 30 must be resubmitted for review and action prior to July 1 of each year, including authorship of textbooks.**

Description of Interest/Activity. Please indicate the interest(s)/Activity (Activities) being described: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

It is the employee's responsibility to ensure that an approved copy of this form is attached to any "Requisition to Purchase" for items 1 and 2. Note that each transaction is subject to review, and justification/explanation may be required to determine if a conflict of interest exists and to comply with state regulations.

**I hereby certify that the information reported here is accurate and complete and does not create a conflict of interest or interfere with the efficient and faithful performance of my professional responsibilities or other institutional obligations.**

\_\_\_\_\_  
Employee's Name Employee's Signature Date

\_\_\_\_\_  
Employee's Title Department

**Reviewed By:** \_\_\_\_\_  
Chairperson or Director Date

\_\_\_\_\_  
Dean or Director Date

\_\_\_\_\_  
Vice President (if appropriate) Date

**Approved By:** \_\_\_\_\_  
President (or Designee) Date