

Financial Interest Specifications

Version: 2  
Date: June 30, 2023  
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Version History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version No.** | **Date** | **Changed By** | **Changes Made** |
| 0.1 |  |  | Initial draft |
| 0.2 | 2015-07-20 | Valerie Smothers | Licensee now free text or entity reference. The Licensed element may occur multiple times, and it may have multiple licensees. Form of business may occur 0 or more. Form of Compensation may occur 0 to 6 times. Added paymentProcessing attribute to YearlyIncome for different types of Intellectual Property and changed name of element to IPYearlyIncome. Removed the following ContractorCategory values: Speaker training, Board Member, Clinical Oversight Board, Scientific Advisory Board, Product Development, Editorial Service, Contracted, Speakers Bureau, Marketing, Other. Added required id attribute to PersonEntity and OrganizationEntity. Removed OtherContractorCategory. Removed hyphen from schema name in sample xml. |
| 0.3 | 2015-08-31 | Valerie Smothers | Added IPYearlyIncome to Licensee, added Licesee to OtherIntellectualPropertyType, added Description to Trademark, corrected typo in other patent holder. Changes EstimatedValue in Travel to EstimatedOrActualValue. |
| 0.4 | 2015-10-26 | Valerie Smothers | Made license title and date optional, added licenseExists attribute to Licensed, added Licensed to IntellectualPropertyOther, added root element back to schema (was mistakenly erased in previous version). |
| 0.5 | 2016-03-28 | Valerie Smothers | Added Licensed element to Copyright.  Added AdditionalInformation to: Employment, IndependentContractor, FifucuaryOfficer, GrantOrContract, Travel, Gift, Stock, StockOptions, OtherSecurities, OtherBusinessOwnership, Patent, Trademark, Copyright, IntellectualpropertyOther. Added support for extensibility to most container elements. |
| 2 | 2023-06-30 | Betty Harvey | Changed element name 'ProfessionalServices' to 'ProfessionalServicesActivities'. Changed 'ProfessionalServicesType' to 'ProfessionalServicesActivitiesType'    Added element 'HourlyRate' under 'Employment' element.    Changed element name 'IndependentContractor' to 'OtherProfessionalActivities' |

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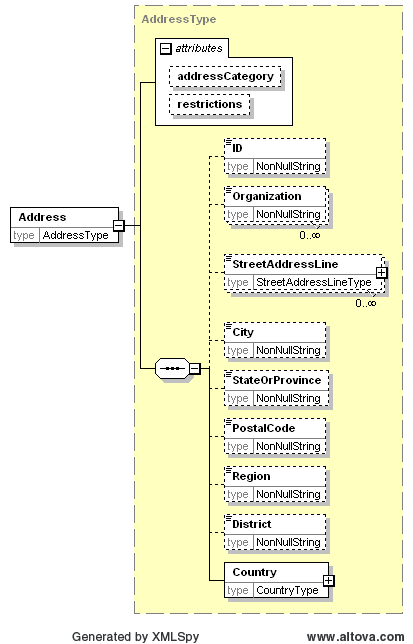
# Documentation Conventions

This document uses the following conventions:

|  |  |
| --- | --- |
| Convention | Description |
| Bold Text | When used with an XML element name, indicates that the element contains sub-elements. |
| *Italics* | When used in an XML element description, an attribute of the XML element. |
| Monospaced type | Sample XML tags, code, schema, or portion thereof. |

The document uses graphics generated by Altova XML Spy® software, which uses the following graphical conventions.

Attributes



Data type

Contains subelements

Multiplicity

Optional element

Required element

# Conformance

To conform to the Financial Interest specification, an XML document:

* Shall be valid according to the Financial Interest schema available at: <http://ns.medbiq.org/financialinterest/v1/financialinterest.xsd>
* Conform to any additional requirements stated in this specification.
* Optionally include elements not defined in this document only in permitted areas and only if those elements are namespace qualified.

# Common Data Types

Most of the elements and attributes in MedBiquitous XML documents use the data types defined by the W3C XML schema definition. In some cases MedBiquitous creates its own datatypes as part of its best practices or to meet a specific requirement. Commonly used datatypes are described below.

Non-null string

Non-null string is a datatype derived from the XML string datatype. Non-null string imposes a minimum length of one character on a string and ensures that required elements are complete.

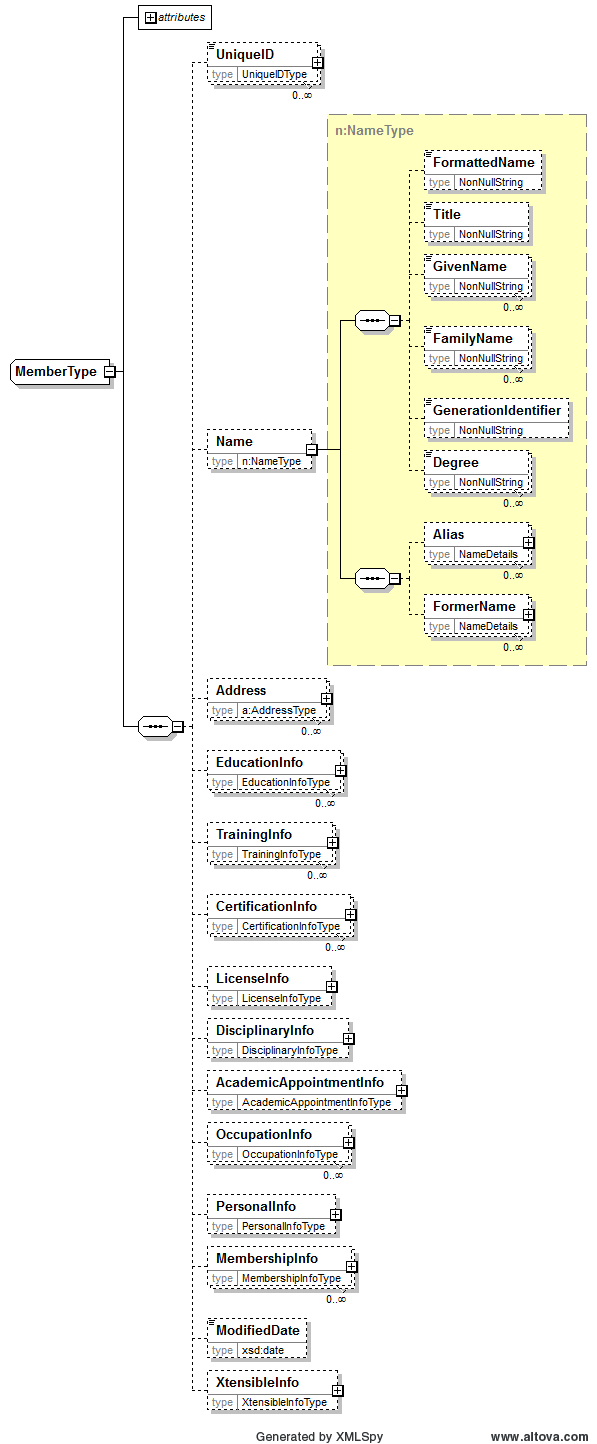
## Common Components

Several container elements are used throughout the Financial Interest data model. These components are:

* Name
* Address
* AverageHours
* ActivityDateSpan
* DateSpan
* Licensed

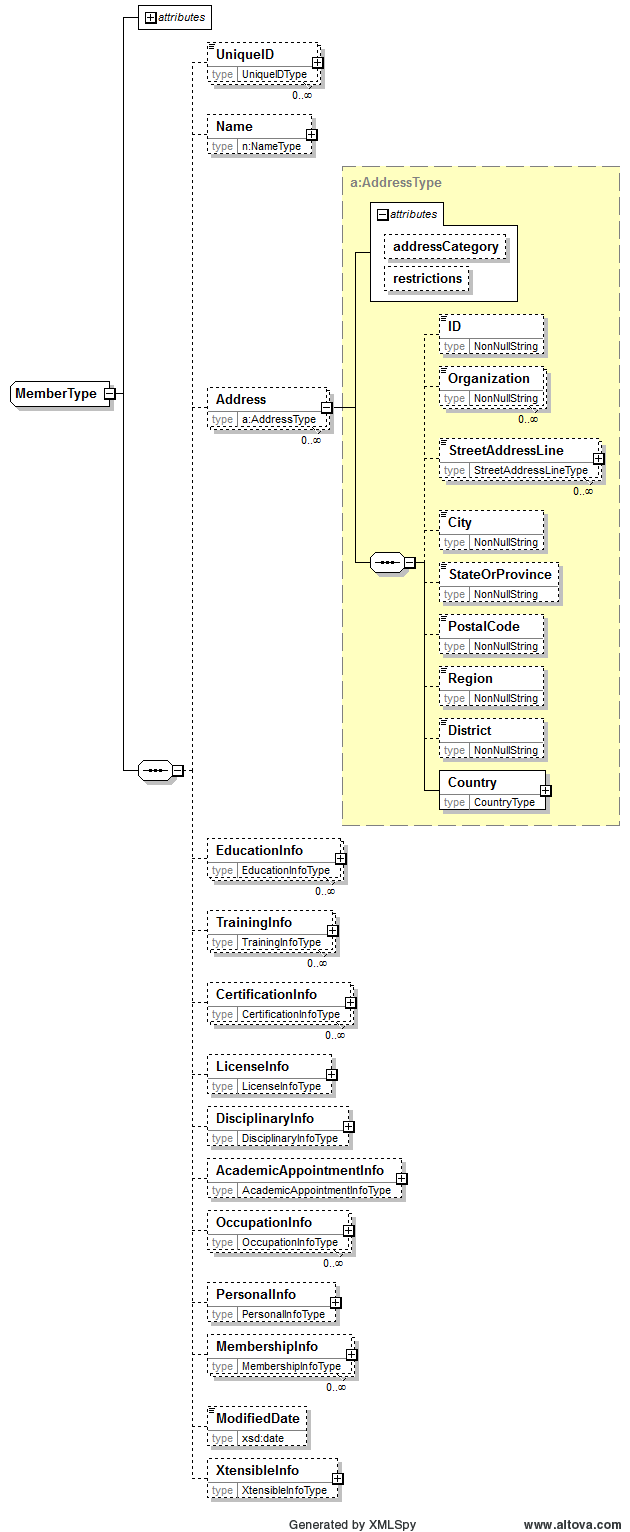
### Name

Name contains sub-elements that define a person’s name in detail. Name uses the NameType from the MedBiquitous Healthcare Professional Profile. For more information, see ANSI /MEDBIQ PP.10.1-2008 Name Specifications and Description Document [[Name](#name)].



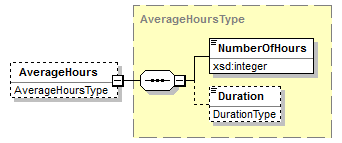
### Address

Address contains sub-elements that define a postal address in detail. Address uses the AddressType from the MedBiquitous Healthcare Professional Profile. For more information, see ANSI /MEDBIQ PP.10.1-2008 Address Specifications and Description Document [[Address](#address)].



### AverageHours

**AverageHours** identifies average hours worked by an individual.

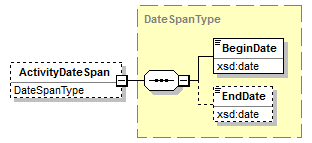


AverageHours Information

| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **AverageHours** | The average hours an individual works in a week, month or year. | Optional | 0 to 1 | Container |
| NumberOfHours | The average number of hours an individual works for the given duration. | Required | 1 to 1 | Number |
| Duration | The duration of the hours reported.   Allowed Values:      Week     Month     Year | Optional | 0 to 1 | Restricted |

### **ActivityDateSpan**

**ActivityDateSpan** is the date with a “begin” and optional “end” date.

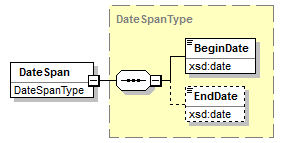
******

ActivityDateSpan Information

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Element | Description | | Required | | | Multiplicity | | Datatype |
| **ActivityDateSpan** | | The date of the activity span with a “begin” and optional “end” date. | | Optional | 0 to 1 | | Container | |
| BeginDate | | The beginning date. | | Required | 1 to 1 | | Date | |
| EndDate | | The end date of the activity. If the end date is absent, the activity is considered ongoing. | | Optional | 0 to 1 | | Date | |

### **DateSpan**

**DateSpan** identifies a “begin” and optional “end” date.

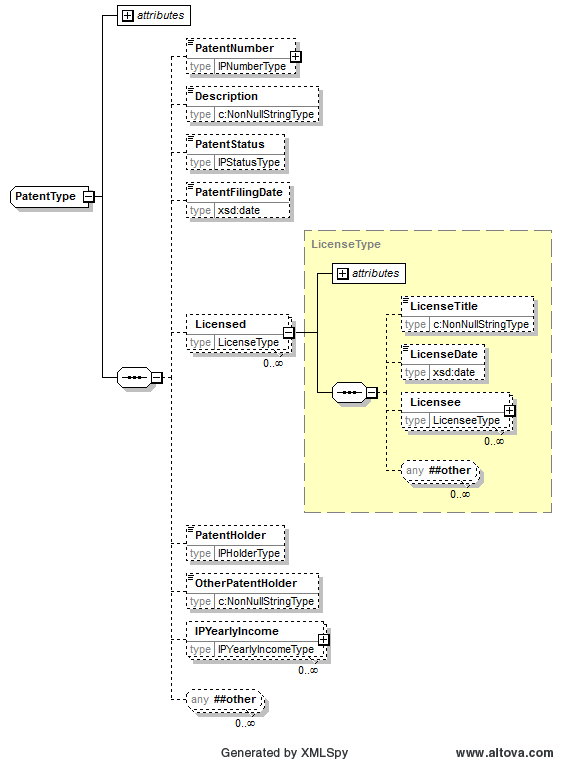


DateSpan Information

| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **DateSpan** | A date span with a “begin” and optional “end” date. | Required | 1 to 1 | Container |
| BeginDate | The beginning date. | Required | 1 to 1 | Date |
| EndDate | The end date of the activity. If the end date is absent, the activity is considered ongoing. | Optional | 0 to 1 | Date |

### **Licensed**

**Licensed** describes licensing of the intellectual property.

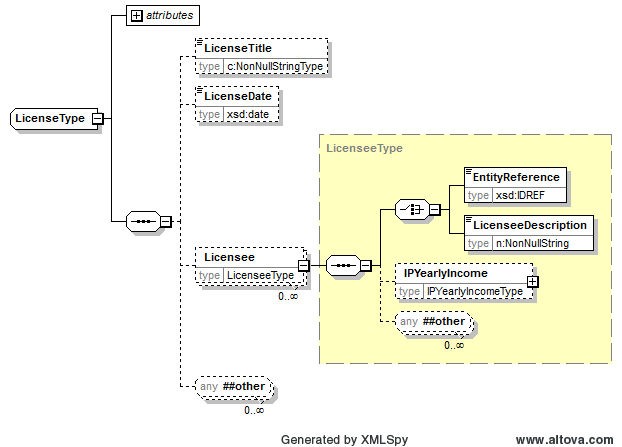


Licensed Information

| Element | Description | | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- | --- |
| **Licensed** | Contains sub-elements that describe licensing of the intellectual property.  Attributes:  *licenseExists* — The 'licenseExists' attribute can be used to show the existence of a license. This attribute is optional and should be used when further information isn't required by the organization. | Optional | | 0 or more | Container |
| LicenseTitle | The name or type of the license. | Optional | | 0 to 1 | Non-null string |
| LicenseDate | The license start date | Optional | | 0 to 1 | Date |
| Licensee | Contains sub-elements that describe the licensee of the intellectual property.  See section Licensee for more information. | Optional | | 0 or more | Container |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | | 0 or more | Any datataype |

### Licensee

Licensee describes the licensee of the intellectual property.



Licensee Information

| Element | Description | | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- | --- |
| **Licensee** | Contains sub-elements that describe the licensee of the intellectual property. | Optional | | 0 or more | Container |
| EntityReference | A reference to a defined OrganizationEntity or PeresonEntity. | Required | | 1 to 1 | IDREF |
| LicenseeDescription | The license start date | Required | | 1 to 1 | Non-null string |
| IPYearlyIncome | Contains subelements that describe the yearly income from this licensee and how the payment to the disclosing individual was processed. For more information, see section IPYearlyIncome. | Optional | | 0 to 1 | Container |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | | 0 or more | Any datataype |

# 

# Common Attributes

MedBiquitous has defined common attributes that are applied to the following elements: **FinancialInterestPackages**, **IndividualFinancialInterestPackage**, and **FinancialDisclosureInformation**.

Use of these attributes is optional.

|  |  |  |  |
| --- | --- | --- | --- |
| **Attribute** | **Description** | **Multiplicity** | **Datatype** |
| id | A unique identifier for this piece of data. The identifier must be unique within the scope of the Healthcare Professional document. | 0 or 1 | ID |
| validityDate | The date in this piece of data was deemed valid. For example, the date of entry. | 0 or 1 | Date |
| restrictions | Indicates whether this piece of information is to be restricted or confidential when sharing information with partner organizations or the general public. Valid values are: Unrestricted, Restricted, Confidential.  Unrestricted indicates that a piece of data may be shared or published.  Restricted indicates that a piece of data may be shared in some instances, but not published. Policies must be defined surrounding the use of restricted data.  Confidential indicates that a piece of data may not be shared or published. | 0 or 1 | Restricted |
| source | The source of this piece of data. | 0 or 1 | String |

## *financialInterestExists*

The financialInterestExists attribute can be used to show the existence of a financial interest.

|  |  |  |  |
| --- | --- | --- | --- |
| Attribute | Description | Multiplicity | Datatype |
| financialInterestExists | The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by the organization. | 0 or 1 | Boolean |

***financialinterestExists*** is an attribute that applies to the following elements.

* Copyright
* Employment
* FiduciaryOfficer
* Gift
* GrantOrContract
* OtherProfessionalActivities
* IntellectualPropertyOther
* OtherBusinessOwnership
* OtherSecurities
* Patent
* StockOptions
* Stock
* Trademark
* Travel

# Introduction

This document describes the MedBiquitous Financial Interest XML Schema in detail. It is intended for use by anyone who wants to create, implement, or create interoperable tools for XML financial disclosures based on this specification. The status of the document is indicated at the bottom of the page; draft documents are subject to review and approval through the MedBiquitous Standards Program Operating Procedures (see <http://medbiq.org/std_specs/devprocess/MedBiquitousANSIProcess.pdf>).

The objective of this Financial Interest Schema is to provide a data structure that allows one to represent one or more organizations to exchange financial disclosure information in a standard format.

The relationships between health professions educators, researchers, and industry are complex. Journals, continuing education providers, schools, societies, teaching hospitals and government agencies often require that authors and faculty disclose their financial interests and other relevant commitments or relationships. Many then work to manage any conflicts. A technical standard will allow institutuons to streamline the reporting of financial interests and other disclosure requirements by using a centralized system for collecting data on financial interest and other required disclosures. Such a system could also improve the accuracy and clarity of information reported by ensuring the consistency of data definitions used among organizations.

# Other Standards, Specifications, or Schemas Referenced

## Other Schema Referenced

This standard references the following standards, specifications, or schemas. The informative references here, which describe how these references are used, link to formal references appearing later in this document.

* ANSI/MEDBIQ PP.10.1-2008, Address [[Address](#address)]  
  The Address specification provides a common format for addresses.
* ANSI/MEDBIQ PP.10.1-2008, Name [[Name](#name)]  
  The Name specification provides a common format for people’s names.
* ANSI/MEDBIQ PP.10.1-2008, Healthcare Professional Profile [[Professional Profile](#professionalprofile)]  
  The Professional Profile provides a common format for describing the unique id, email address, and contact numbers.
* MedBiquitous Common Specifications [[Common](#common)]  
  The MedBiquitous Common Specification defines datatypes commonly used across MedBiquitous specifications.

# 

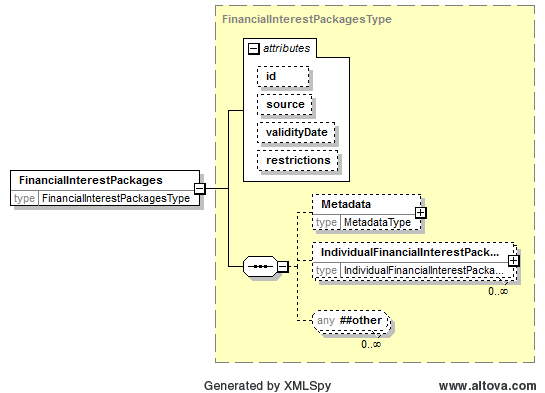
# Financial Interest Schema

The following sections explain the Financial Interest Schema grammar. Values in **bold** under XML Tags column indicate that the element has sub-elements.

All the elements having sub-elements will be defined in separate sections. All elements without sub-elements will be defined within the appropriate element sections that use them.

## FinancialInterestPackages

**FinancialInterestPackages** is information about the financial interests of several individuals.



| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| FinancialInterestPackages | This element is the root element. It is a container for multiple individual packages. This data element is used for batch processing. | Optional | 0 to more | Container |
| Metadata | Information about the creation, update, and disclosure profile for a set of information. For more information, see section Metadata. | Optional | 0 to 1 | Container |
| IndividualFinancialInterestPackage | Information about the financial interests of an individual. For more information, see section IndividualFinancialInterestPackage. | Optional | 0 to more | Container |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

**Example:**

<IndividualFinancialInterestPackage id="Package1">

<Metadata>

<DisclosureProfile>NEJM Manuscript Submission</DisclosureProfile>

<CreationInfo>

<CreationDateTime>2015-02-24T17:43:00</CreationDateTime>

<UniqueID domain="aamc">aamc1234</UniqueID>

</CreationInfo>

<UpdateInfo>

<UpdateDateTime>2015-02-28T12:19:00</UpdateDateTime>

<UniqueID domain="aamc">aamc1234</UniqueID>

</UpdateInfo>

</Metadata>

<DisclosingIndividual>

...

</DisclosingIndividual>

<FinancialDisclosureInformation id="Employment">

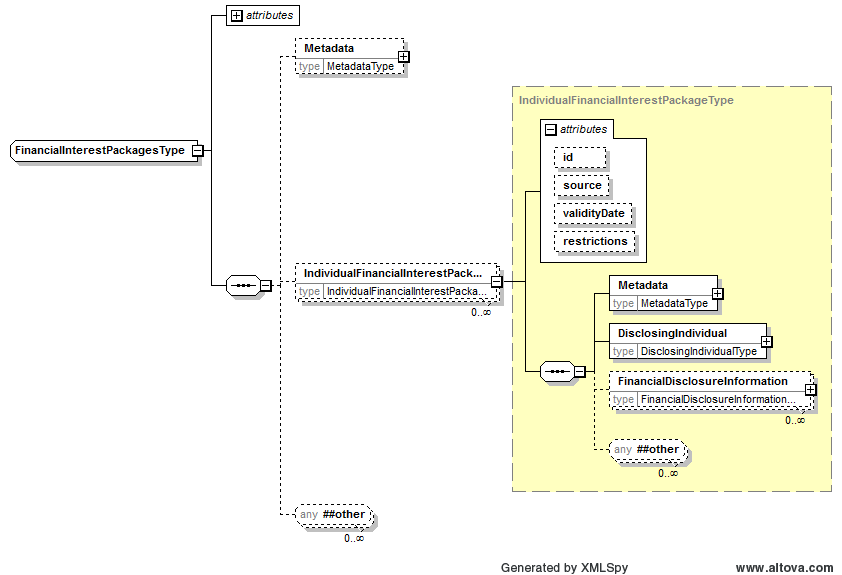
...

</FinancialDisclosureInformation>

</IndividualFinancialInterestPackage>

## IndividualFinancialInterestPackage

**IndividualFinancialInterestPackage** provides information of an individual’s financial interests.

******

IndividualFinancialInterestPackage Information

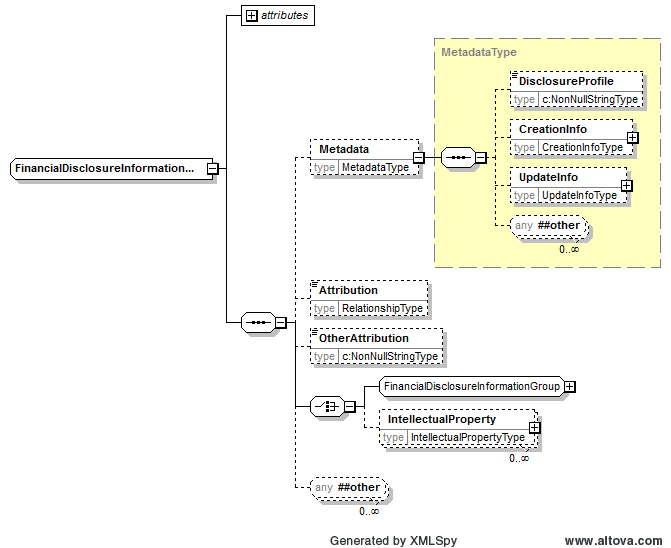
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| IndividualFinancialInterestPackage | Information about the financial interests of an individual. | Optional | 0 to more | Container |
| Metadata | Information about the creation, update, and disclosure profile for a set of information.  For more information, see section Metadata. | Required | 1 to 1 | Container |
| DisclosingIndividual | The individual who is disclosing financial interests. For more information, see section Disclosing Individual. | Required | 1 to 1 | Container |
| FinancialDisclosureInformation | Information regarding a set of financial interests with a particular company or in regards to intellectual property.  For more information, see section DinancialDisclosureInformation. | Optional | 0 to more | Container |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

Example:

<IndividualFinancialInterestPackage id="Package2">  
 <Metadata>  
 <CreationInfo>  
 <CreationDateTime>2015-04-15T15:20:01</CreationDateTime>  
 <UniqueID domain="AAMC">Smith.John</UniqueID>  
 </CreationInfo>  
 </Metadata>  
 <DisclosingIndividual>  
 ...  
 </DisclosingIndividual>  
 <FinancialDisclosureInformation id="EmptyContent">  
 ...  
 </FinancialDisclosureInformation>  
</IndividualFinancialInterestPackage>

## Metadata

Metadata contains information about the creation, update, and disclosure profile for a set of information.

******

Metadata Information

| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| Metadata | Information about the creation, update, and disclosure profile for a set of information | Optional | 0 to 1 | Container |
| DisclosureProfile | A label for the profile used to create the disclosure or disclosure package. For example, NEJM Manuscript Submission. | Optional | 0 to 1 | Non-null string |
| CreationInfo | Information on the creator for a set of information as well as the date and time the information was created. For more information, see section CreationInfo. | Optional | 0 to 1 | Container |
| UpdateInfo | Information on the individual who updated a set of information as well as the date and time the information was updated. For more information, see section UpdateInfo. | Optional | 0 to 1 | Container |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

**Example:**

<Metadata>

<DisclosureProfile>NEJM Manuscript Submission</DisclosureProfile>

<CreationInfo>

<CreationDateTime>2015-02-24T17:43:00</CreationDateTime>

<UniqueID domain="aamc">aamc1234</UniqueID>

</CreationInfo>

<UpdateInfo>

<UpdateDateTime>2015-02-28T12:19:00</UpdateDateTime>

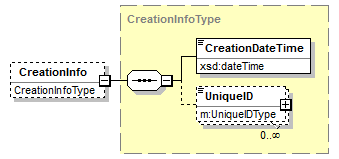
<UniqueID domain="aamc">aamc1234</UniqueID>

</UpdateInfo>

</Metadata>

### CreationInfo

CreationInfo describes a set of information including date and time when information was created.

******  
CreationInfo Information

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Element | Description | Required | Multiplicity | Datatype |
| **CreationInfo** | Information on the creator for a set of information as well as the date and time the information was created. | Optional | 0 to 1 | Container |
| CreationDateTime | A date and timestamp indicating when the data component was created. | Required | 1 to 1 | xsd:dateTime |
| UniqueID | The identification of the entity (owner, designee or organization) creating the data.   UniqueID uses the UniqueIDType from the MedBiquitous Healthcare Professional Profile. | Optional | 0 to more | For more information, see ANSI/MEDBIQ 10.1-2008 Healthcare Professional Profile [[Professional Profile](#professionalprofile)]. |

**Example:**

<CreationInfo>

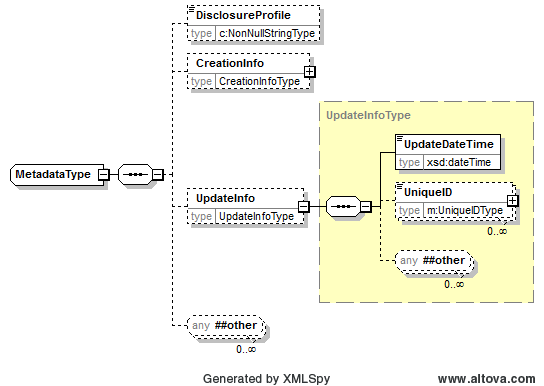
<CreationDateTime>2015-02-24T17:43:00</CreationDateTime>

<UniqueID domain="aamc">aamc1234</UniqueID>

</CreationInfo>

### UpdateInfo

**UpdateInfo** identifies individual who updated a set of information.



UpdateInfo Information

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Element | Description | Required | Multiplicity | Datatype |
| **UpdateInfo** | Information on the individual who updated a set of information as well as the date and time the information was updated. | Optional | 0 to 1 | Container |
| UpdateDateTime | A date and timestamp indicating when the data component was modified. | Required | 1 to 1 | xsd:dateTime |
| UniqueID | The identification of the entity (owner, designee or organization) updating the data.   UniqueID uses the UniqueIDType from the MedBiquitous Healthcare Professional Profile. | Optional | 0 to more | For more information, see ANSI/MEDBIQ 10.1-2008 Healthcare Professional Profile [[Professional Profile](#professionalprofile)]. |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

**Example:**

<Metadata>

<DisclosureProfile>NEJM Manuscript Submission</DisclosureProfile>

<CreationInfo>

<CreationDateTime>2015-02-24T17:43:00</CreationDateTime>

<UniqueID domain="aamc">aamc1234</UniqueID>

</CreationInfo>

<UpdateInfo>

<UpdateDateTime>2015-02-28T12:19:00</UpdateDateTime>

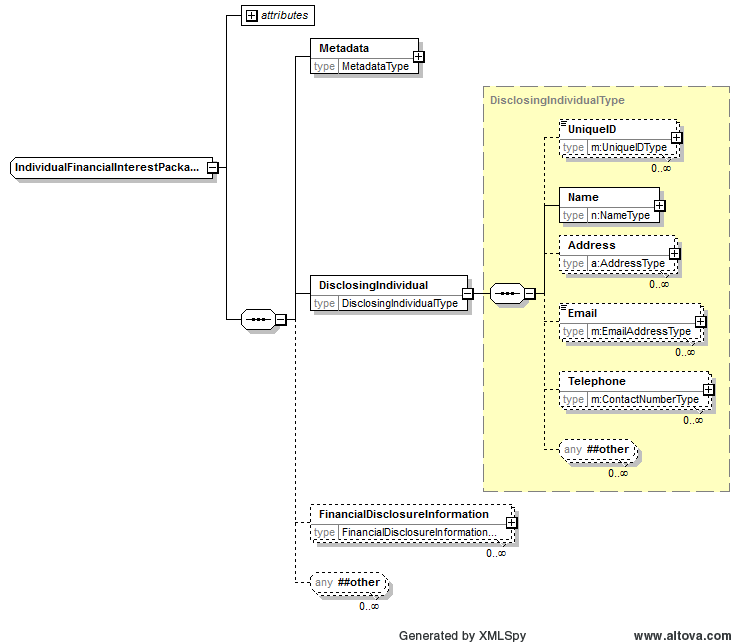
<UniqueID domain="aamc">aamc1234</UniqueID>

</UpdateInfo>

</Metadata>

## DisclosingIndividual

**DisclosingIndividual** identifies the individual who is disclosing financial interests.



DisclosingIndividual Information

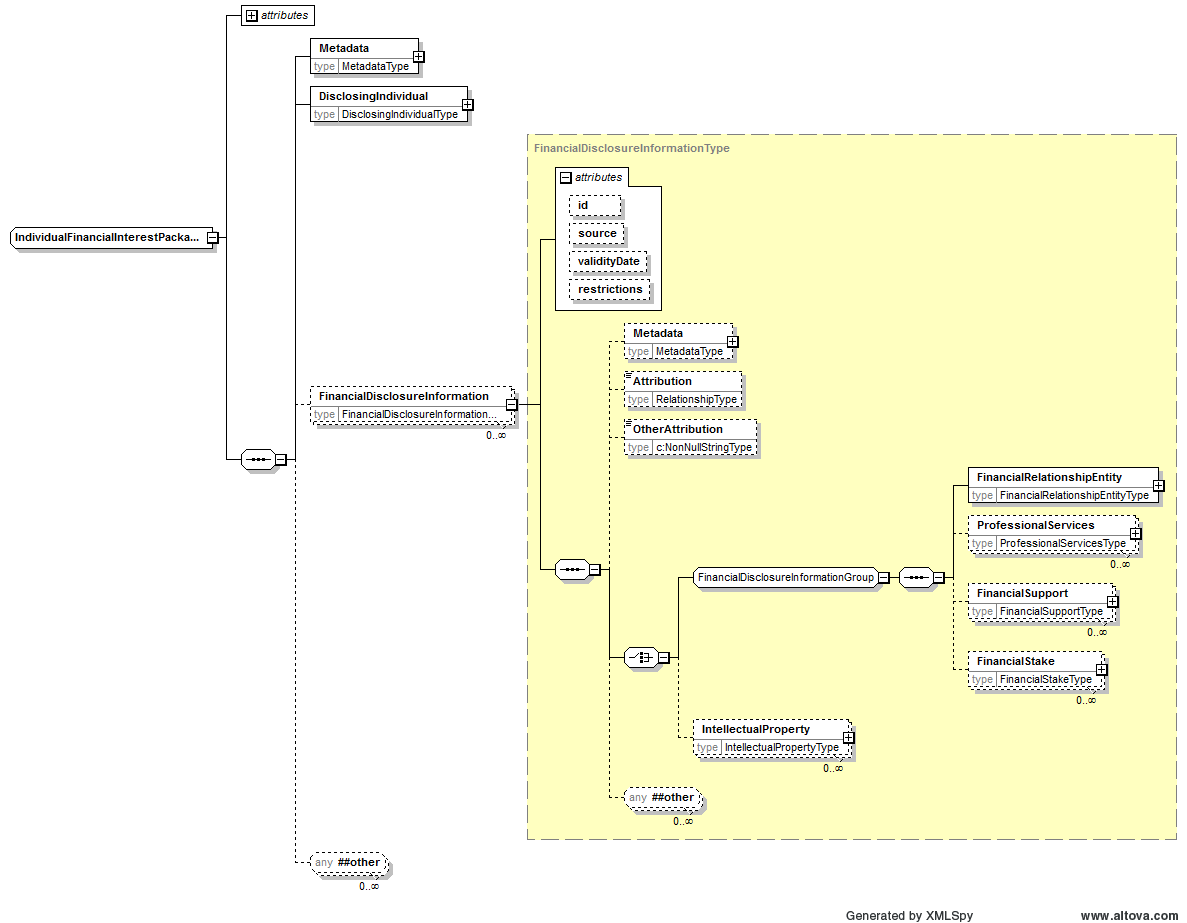
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| DisclosingIndividual | The individual who is disclosing financial interests. | Required | 1 to 1 | Container |
| UniqueID | UniqueID uses the UniqueIDType from the MedBiquitous Healthcare Professional Profile. | Optional | 0 to more | For more information, see ANSI/MEDBIQ 10.1-2008 Healthcare Professional Profile [[Professional Profile](#professionalprofile)]. |
| Name | Name contains sub-elements that define a person’s name in detail. Name uses the NameType from the MedBiquitous Healthcare Professional Profile. | Required | 1 to 1 | Container. For more information, see ANSI /MEDBIQ PP.10.1-2008 Name Specifications and Description Document [[Name](#name)]. |
| Address | Address contains sub-elements that define a postal address in detail. Address uses the AddressType from the MedBiquitous Healthcare Professional Profile. | Optional | 0 to more | Container. For more information, see ANSI /MEDBIQ PP.10.1-2008 Address Specifications and Description Document [[Address](#address)]. |
| Email | EmailAddress defines a person's email address. Email uses the EmailType from the MedBiquitous Healthcare Professional Profile. | Optional | 0 to more | Email address. For more information, see ANSI/MEDBIQ 10.1-2008 Healthcare Professional Profile [[Professional Profile](#professionalprofile)]. |
| Telephone | Telephone contains sub-elements that define a person's telephone number. Telephone uses the ContactNumberType from the MedBiquitous Healthcare Professional Profile. | Optional | 0 to more | Container. For more information, see ANSI/MEDBIQ 10.1-2008 Healthcare Professional Profile [[Professional Profile](#professionalprofile)]. |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

**Example:**

<DisclosingIndividual>  
 <Name>  
 <n:GivenName>John</n:GivenName>  
 <n:FamilyName>Smith</n:FamilyName>  
 </Name>  
 <Address><a:StreetAddressLine>1212 Ivory Lane</a:StreetAddressLine>  
 <a:City>Boston</a:City>  
 <a:StateOrProvince>MA</a:StateOrProvince>  
 <a:PostalCode>22222</a:PostalCode>  
 <a:Country>  
 <a:CountryName>United States</a:CountryName>  
 </a:Country>  
 </Address>  
 <Email>John.Smith@abc.org</Email>  
 <Telephone>  
 <m:TelephoneNumber>301-555-1212</m:TelephoneNumber>  
 </Telephone>  
</DisclosingIndividual>

## FinancialDisclosureInformation

**FinancialDisclosureInformation** regards a set of financial interests or intellectual property.

******

FinancialDisclosureInformation Information

| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| FinancialDisclosureInformation | Information regarding a set of financial interests with a particular company or in regards to intellectual property. | Optional | 0 to more | Container |
| Metadata | Information about the creation, update, and disclosure profile for a set of information. For more information, see section Metadata. | Optional | 0 to 1 | Container |
| Attribution | The person to whom the financial interests are attributed.   Allowed Values:  Self  SpouseOrPartner  DependentChild  Other | Optional | 0 to 1 | Restricted |
| OtherAttribution | The person to whom the financial interests are attributed. The "OtherAttribution" element should be used when the "Attribution" element is equal to "Other". | Optional | 0 to 1 | Non-null string |
|  |  |  |  |  |
| FinancialRelationshipEntity | The individual or organization with which the disclosing individual has a financial relationship.  For more information, see sectionFinancialRelationshipEntity. | Required | 1 to 1 | Container |
| ProfessionalServicesActivities | Contains sub-elements that describe professional services provided to an entity. Professional services include employment, independent contractor, or fiduciary officer relationships. For more information, see section ProfessionalServicesActivities. | Optional | 0 to more | Container |
| FinancialSupport | Contains sub-elements that describe financial support, including grants, travel, and gifts. For more information, see section FinancialSupport. | Optional | 0 to more | Container |
| FinancialStake | Contains sub-elements that define financial stake in an entity, including stocks, stock options, other securities, and ownership. For more information, see section FinancialStake. | Optional | 0 to more | Container |
|  |  |  |  |  |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

Example:

<FinancialDisclosureInformation>  
 <FinancialRelationshipEntity>  
 <OrganizationEntity>  
 <OrganizationName>ABC Corporation</OrganizationName>  
 <Address>   
 <a:StreetAddressLine>567 Security Boulevard</a:StreetAddressLine>  
 <a:City>Baltimore</a:City>  
 <a:StateOrProvince>MD</a:StateOrProvince>  
 <a:PostalCode>22222</a:PostalCode>  
 <a:Country>  
 <a:CountryCode>US</a:CountryCode>  
 </a:Country>  
 </Address>  
 </OrganizationEntity>  
 </FinancialRelationshipEntity>  
 <ProfessionalServicesActivities>  
 ...  
 </ProfessionalServicesActivities>  
 <FinancialStake>  
 ...  
 </FinancialStake>  
 <FinancialSupport>  
 ...  
 </FinancialSupport>  
</FinancialDisclosureInformation>

or

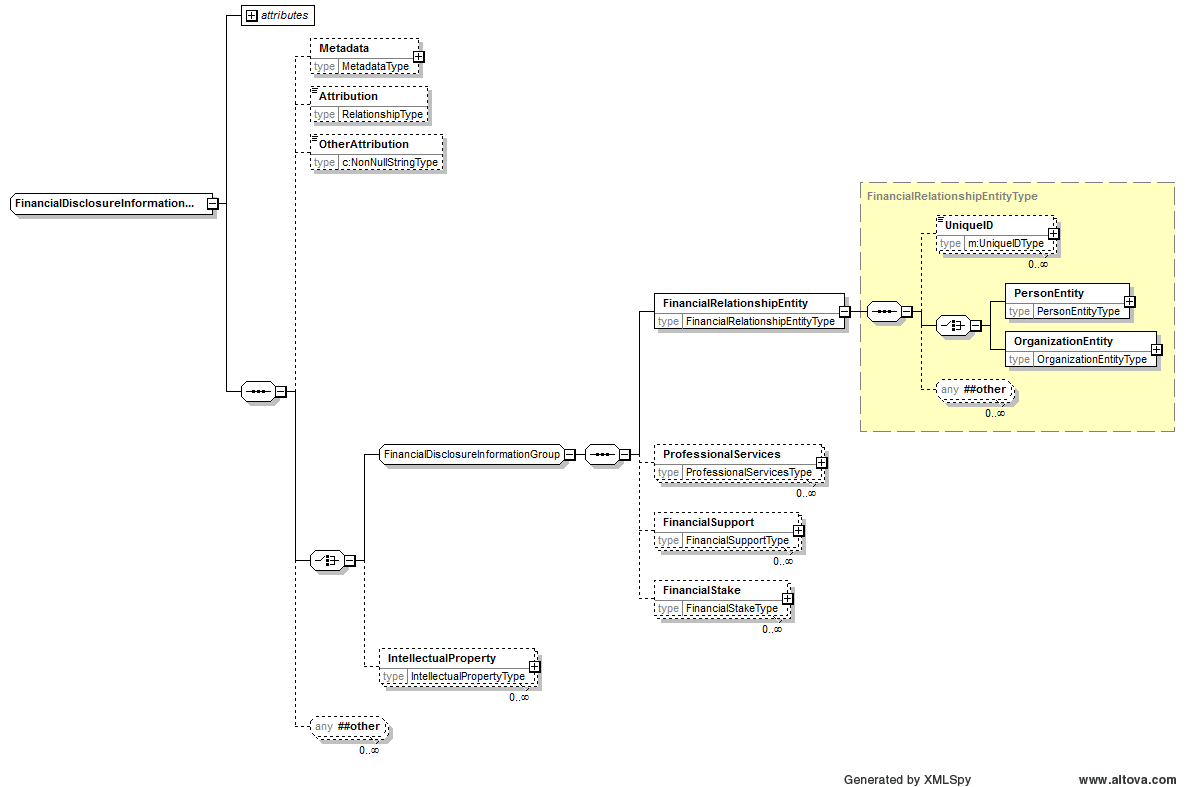
<FinancialDisclosureInformation>  
 <IntellectualProperty>

...

</IntellectualProperty>  
</FinancialDisclosureInformation>

## FinancialRelationshipEntity

**FinancialRelationshipEntity** identifies the individual or organization the disclosing individual has a financial relationship.

******

FinancialRelationshipEntity Information

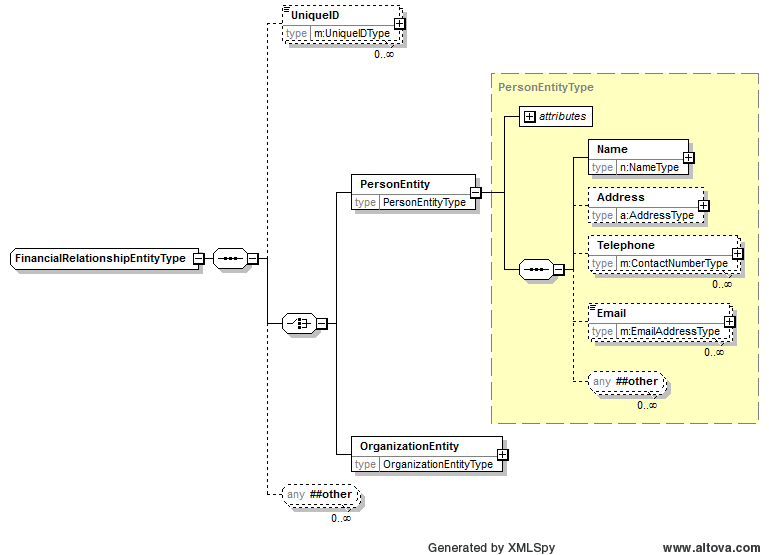
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **FinancialRelationshipEntity** | The individual or organization with which the disclosing individual has a financial relationship. | Required | 1 to 1 | Container |
| UniqueID | A unique alphanumeric identifier for the individual. UniqueID has the following attribute: domain Defines the community, society, or organization that is the source of the unique id. Use of the domain attribute is required when using the UniqueID element.  As a best practice, use the following format for the domain: idd:domainname:localidentifier  Where:  domainname is an internet domain name owned by the organization issuing the unique ID and  localidentifer is a local identifier for the type of unique ID. For more information, see ANSI /MEDBIQ PP.10.1-2008 Healthcare Professional Profile Specifications Document | Optional | 0 to more | Non-null String. For more information, see ANSI/MEDBIQ 10.1-2008 Healthcare Professional Profile [[Professional Profile](#professionalprofile)]. |
| **PersonEntity** | The person with whom the disclosing individual has a financial relationship. For more information, see section PersonEntity. | Required | 1 to 1 | Container |
| **OrganizationEntity** | The organization with which the disclosing individual has a financial relationship. For more information, see section OrganizationEntity. | Required | 1 to 1 | Container |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

**Example:**

<FinancialRelationshipEntity>  
 <UniqueID domain="NASDAQ">AAPL</UniqueID>  
 <OrganizationEntity>  
 <OrganizationName>Apple Corporation</OrganizationName>  
 <FormOfBusiness>IT Company</FormOfBusiness>  
 <CompanyCategory>Public</CompanyCategory>  
 <Address>  
 <a:StreetAddressLine>1 Infinite Loop</a:StreetAddressLine>  
 <a:City>Cupertino</a:City>  
 <a:StateOrProvince>CA</a:StateOrProvince>  
 <a:PostalCode>95014</a:PostalCode>  
 <a:Country>  
 <a:CountryCode>US</a:CountryCode>  
 </a:Country>  
 </Address>  
 <Telephone>  
 <m:TelephoneNumber>408-996-1010</m:TelephoneNumber>  
 </Telephone>  
 <Email>info@apple.com</Email>  
 </OrganizationEntity>  
</FinancialRelationshipEntity>

### **PersonEntity**

**PersonEntity** identifies the person with a financial relationship to the disclosing individual.



PersonEntity Element Information

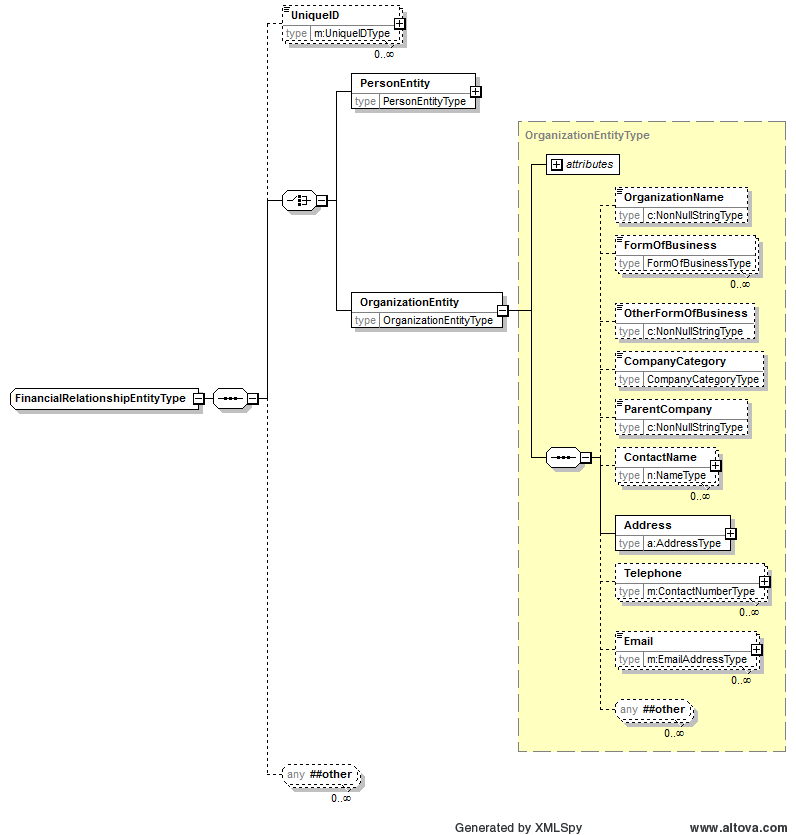
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **PersonEntity** | The person with whom the disclosing individual has a financial relationship.  PersonEntity has the following attribute:  *id* – a identifier that uniquely identifies the PersonEntity in this XML document. Identifiers must start with a letter or underscore and can only contain letters, digits, underscores, hyphens, and periods. | Required | 1 to 1 | Container |
| **Name** | Name contains sub-elements that define a person’s name in detail. Name uses the NameType from the MedBiquitous Healthcare Professional Profile. | Required | 1 to 1 | Container. For more information, see ANSI /MEDBIQ PP.10.1-2008 Name Specifications and Description Document [[Name](#name)]. |
| **Address** | Address contains sub-elements that define a postal address in detail. Address uses the AddressType from the MedBiquitous Healthcare Professional Profile. | Optional | 0 to 1 | Container. For more information, see ANSI /MEDBIQ PP.10.1-2008 Address Specifications and Description Document [[Address](#address)]. |
| **Telephone** | Telephone contains sub-elements that define a person's telephone number. Telephone uses the ContactNumberType from the MedBiquitous Healthcare Professional Profile. | Optional | 0 to more | Container. For more information, see ANSI/MEDBIQ 10.1-2008 Healthcare Professional Profile [[Professional Profile](#professionalprofile)]. |
| Email | EmailAddress defines a person's email address. Email uses the EmailType from the MedBiquitous Healthcare Professional Profile. | Optional | 0 to more | Email address. For more information, see ANSI/MEDBIQ 10.1-2008 Healthcare Professional Profile [[Professional Profile](#professionalprofile)]. |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

**Example:**

<PersonEntity>  
 <Name>  
 <n:Title>Dr.</n:Title>  
 <n:GivenName>Richie</n:GivenName>  
 <n:FamilyName>Rich</n:FamilyName>  
 </Name>  
 <Address>  
 <a:City>Manhattan</a:City>  
 <a:StateOrProvince>NY</a:StateOrProvince>  
 <a:Country>  
 <a:CountryCode>US</a:CountryCode>  
 </a:Country>  
 </Address>  
 <Telephone>  
 <m:TelephoneNumber>212-555-1212</m:TelephoneNumber>  
 </Telephone>  
 <Email>rrich@philanthropy.org</Email>  
</PersonEntity>

### OrganizationEntity

**OrganizationEntity** identifies the organization with a financial relationship to the disclosing individual.

******

OrganizationEntity Information

| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **OrganizationEntity** | The organization with which the disclosing individual has a financial relationship.  OrganizationEntity has the following attribute:  *id* – a identifier that uniquely identifies the OrganizationEntity in this XML document. Identifiers must start with a letter or underscore and can only contain letters, digits, underscores, hyphens, and periods. | Required | 1 to 1 | Container |
| OrganizationName | An organizational name. | Optional | 0 to 1 | Non-null string |
| FormOfBusiness | The type of business in which this entity engages.   Allowed Values:       Pharmaceutical Company      Device Manufacturer      Medical Supply Company      Health Care Entity      IT Company      Investment Firm      Other | Optional | 0 or more | Restricted |
| OtherFormOfBusiness | The type of business in which this entity engages. This element should be used when the "FormOfBusiness" element is equal to "Other". | Optional | 0 to 1 | Non-null string |
| CompanyCategory | Identifying whether the company is a private or publicly held company.   Allowed Values:      Private     Public | Optional | 0 to 1 | Restricted |
| ParentCompany | The parent company of the organization. The parent company should be indicated when the organization is a subsidiary to another organization. | Optional | 0 to 1 | Non-null string |
| **ContactName** | A name of the main point of contact at the organization. ContactName uses the NameType from the MedBiquitous Healthcare Professional Profile. | Optional | 0 to more | Container. For more information, see ANSI /MEDBIQ PP.10.1-2008 Address Specifications and Description Document [[Address](#address)]. |
| **Address** | Address contains sub-elements that define a postal address in detail. Address uses the AddressType from the MedBiquitous Healthcare Professional Profile. | Required | 1 to 1 | Container. For more information, see ANSI /MEDBIQ PP.10.1-2008 Address Specifications and Description Document [[Address](#address)]. |
| **Telephone** | Telephone contains sub-elements that define a person's telephone number. Telephone uses the ContactNumberType from the MedBiquitous Healthcare Professional Profile. | Optional | 0 to more | Container. For more information, see ANSI/MEDBIQ 10.1-2008 Healthcare Professional Profile [[Professional Profile](#professionalprofile)]. |
| Email | EmailAddress defines a person's email address. Email uses the EmailType from the MedBiquitous Healthcare Professional Profile. | Optional | 0 to more | Email address. For more information, see ANSI/MEDBIQ 10.1-2008 Healthcare Professional Profile [[Professional Profile](#professionalprofile)]. |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

**Example:**

<OrganizationEntity>  
 <OrganizationName>Company A</OrganizationName>  
 <FormOfBusiness>Device Manufacturer</FormOfBusiness>  
 <ParentCompany>Corporation A</ParentCompany>  
 <ContactName>  
 <n:FormattedName>Joy Smith</n:FormattedName>  
 </ContactName>  
 <Address>  
 <a:StreetAddressLine>1600 B Street, NW</a:StreetAddressLine>  
 <a:City>Boston</a:City>  
 <a:StateOrProvince>MA</a:StateOrProvince>  
 <a:PostalCode>22222</a:PostalCode>  
 <a:Country>  
 <a:CountryCode>US</a:CountryCode>  
 </a:Country>  
 </Address>  
 <Telephone>  
 <m:CountryCode>1</m:CountryCode>  
 <m:TelephoneNumber>888-888-8881</m:TelephoneNumber>  
 </Telephone>  
 <Email>info@companya.com</Email>  
</OrganizationEntity>

## ProfessionalServicesActivities

**ProfessionalServicesActivities** contains sub-elements that describe professional services provided.

A picture containing text, screenshot, font, line

Description automatically generated

ProfessionalServices Information

| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| ProfessionalServicesActivities | Contains sub-elements that describe professional services provided to an entity. Professional services include employment, independent contractor, or fiduciary officer relationships. | Optional | 0 to more | ProfessionalServices |
| Employment | Contains sub-elements that describe an individual's employment with an entity.    Attributes:       *financialInterestExists* - Indicates whether or not a financial interest exists. This attribute is optional and should be used when further information isn't required by the organization. | Optional | 0 to more | Employment |
| OtherProfessionalActivities | Contains sub-elements that describe an independent contractor relationship with an entity.   Attributes:      *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | I**OtherProfessionalActivities** |
| FiduciaryOfficer | Contains sub-elements that describe in individual's fiduciary officer relationship with an entity.    Attributes:    *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | FiduciaryOfficer |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

Example:

<ProfessionalServices>  
 <Employment>  
 ...  
 </Employment>  
 <**OtherProfessionalActivities**>  
 ...  
 </**OtherProfessionalActivities**>  
 <FiduciaryOfficer>  
 ...  
 </FiduciaryOfficer>  
</ProfessionalServices>

### Employment

**Employment** identifies an individual’s employment with an entity.

A picture containing text, screenshot, parallel, number

Description automatically generated

Employment Information

| Element | Description | Required | Multiplicity | | Datatype |
| --- | --- | --- | --- | --- | --- |
| **Employment** | Contains sub-elements that describe an individual's employment with an entity.  Attributes:       *financialInterestExists* - Indicates whether or not a financial interest exists. This attribute is optional and should be used when further information isn't required by the organization. | Optional | 0 to more | Container | |
| EmploymentTitle | Title of an individual for the purposes of their employment. | Optional | 0 to 1 | Non-null string | |
| EmploymentDescription | Descriptive information concerning an individual’s employment. | Optional | 0 to 1 | Non-null string | |
| DateSpan | A date span with a “begin” and optional “end” date. | Optional | 0 to 1 |  | |
| AnnualCompensationAmount | The annual compensation amount.  Attributes:      *year* - The year in which the compensation was earned.      *type* - Valid values are Actual and estimated.  (Allowed values: Actual, Estimated)       *valuationDate* - The date the value was assessed.      *currencyCode* - The currency code of the amount indicated. Recommended values are ISO 4217 3-letter alphabetic codes. For example, USD for US dollar, CAD for the Canadian dollar, and EUR for the Euro. Valid values are limited to 3-character strings. | Optional | 0 to more | Non-null string | |
| **HourlyRate** | The hourly rate a person receives. | Optional | 0 to 1 | Monetary Type: 00.00 | |
| **AverageHours** | The average hours an individual works in a week, month or year. For more information, see section AverageHours. | Optional | 0 to 1 | Container | |
| FormOfCompensation | The form of compensation that an individual receives.  Allowed Values:           Cash       Equity       Equity Options  Ownership       Unpaid       Other | Optional | 0 to 6 | Restricted | |
| OtherFormOfCompensation | The form of compensation that an individual receives. The "OtherFormOfCompensation" element should be used when the value of "FormOfCompensation" element is equal to "Other". | Optional | 0 to 1 | Non-null string | |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string | |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype | |

**Example:**

<Employment>  
 <DateSpan>  
 <BeginDate>1999-01-01</BeginDate>  
 </DateSpan>  
 <AnnualCompensationAmount>175000</AnnualCompensationAmount>  
 <AverageHours>  
 <NumberOfHours>40</NumberOfHours>  
 <Duration>Week</Duration>  
 </AverageHours>  
 <FormOfCompensation>Cash</FormOfCompensation>  
</Employment>

### OtherProfessionalActivies

**OtherProfessionalActivities** describes the other professional relationships between an individual and an entity. A screenshot of a computer

Description automatically generated with low confidence

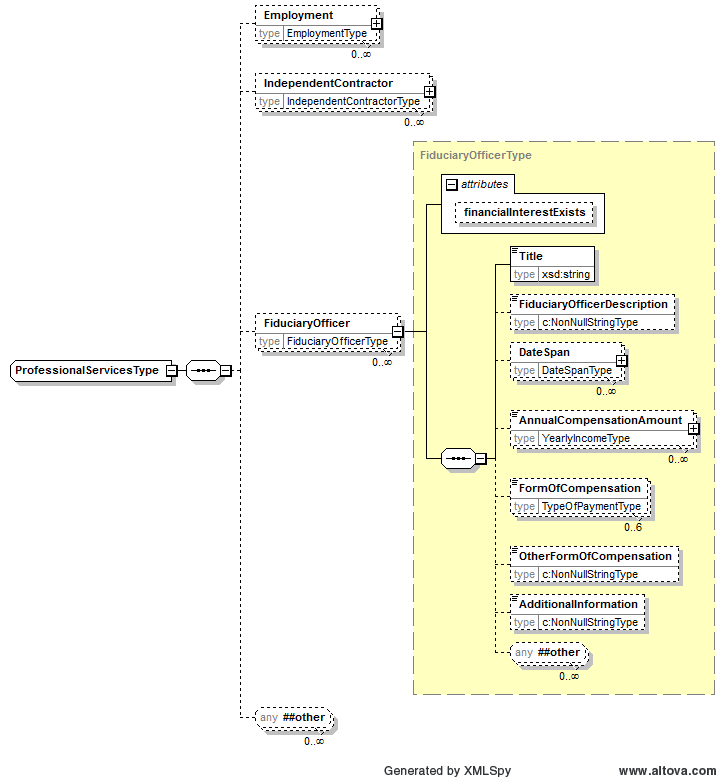
**OtherProfessionalActivities**Information

| Element | Description | Required | Multiplicity | Datatypes |
| --- | --- | --- | --- | --- |
| **OtherProfessionalActivities** | Contains sub-elements that describes the other professional relationships between an individual and an entity. *Attributes*:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | Container |
| IndependentContractorTitle | Title of an individual for the purposes of their independent contractor position. | Optional | 0 to 1 | Non-null string |
| ContractDescription | Descriptive information concerning an individual’s contracting responsibilities. | Optional | 0 to 1 | Non-null string |
| ContractorCategory | The contractor category type. This element contains an enumerated list of valid categories.   Allowed Values:    Consultant   Expert Witness   Data And Safety Monitoring   Professional Investigator    End Point Review Committee | Optional | 0 to more | Restricted. |
| **ActivityDateSpan** | The date of the activity span with a “begin” and optional “end” date.  For more information, see section ActivityDateSpan. | Optional | 0 to 1 | Container |
| AnnualCompensationAmount | The annual compensation amount.    Attributes:       *year* - The year in which the compensation was earned.      *type* - Valid values are Actual and Estimated. (Allowed values: Actual, Estimated)       *valuationDate* - The date the value was assessed.      *currencyCode* - The currency code of the amount indicated. Recommended values are ISO 4217 3-letter alphabetic codes. For example, USD for US dollar, CAD for the Canadian dollar, and EUR for the Euro. Valid values are limited to 3-character strings. | Optional | 0 to more | Non-null string |
| **AverageHours** | The average hours an individual works in a week, month or year. For more information, see section AverageHours. | Optional | 0 to 1 | Container |
| FormOfCompensation | The form of compensation that an individual receives   Allowed Values:   Cash   Equity   EquityOptions   Ownership   Unpaid   Other | Optional | 0 to 6 | Restricted |
| OtherFormOfCompensation | The form of compensation that an individual receives. "OtherFormOfCompensation" element should be used when the value of "FormOfCompensation" element is equal to "Other". | Optional | 0 to 1 | Non-null string |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

**Example:**

<**OtherProfessionalActivities**>  
 <ContractorCategory>Consultant</ContractorCategory>  
 <ActivityDateSpan>  
 <BeginDate>2013-03-15</BeginDate>  
 <EndDate>2014-12-30</EndDate>  
 </ActivityDateSpan>  
 <AnnualCompensationAmount year="2013" type="Actual" currencyCode="US">5000</AnnualCompensationAmount>  
 <AnnualCompensationAmount year="2014" type="Estimated" currencyCode="US">10000</AnnualCompensationAmount>  
 <FormOfCompensation>Equity</FormOfCompensation>  
</**OtherProfessionalActivities**>

### FiduciaryOfficer

**FiduciaryOfficer** describes the relationship between an individual’s fiduciary officer and an entity.******

FiduciaryOfficer Information

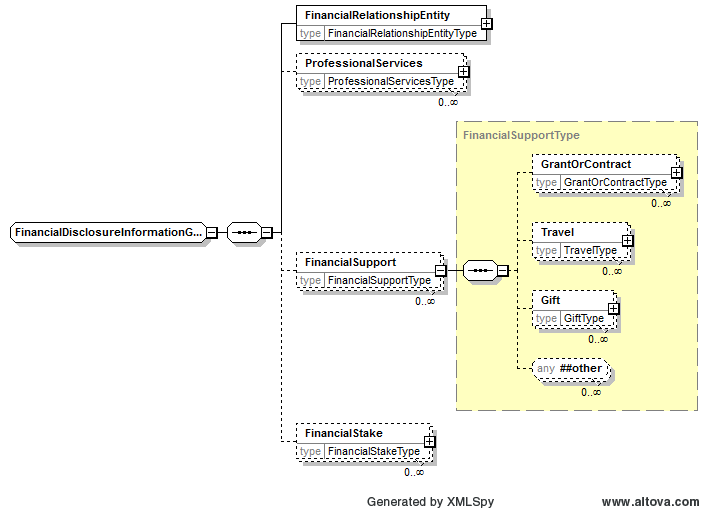
|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Element | Description | Required | Multiplicity | Datatype |
| FiduciaryOfficer | Contains sub-elements that describe in individual's fiduciary officer relationship with an entity. Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | Container |
| Title | The official title of the fiduciary position. | Optional | 1 to 1 | Non-null string |
| FiduciaryOfficerDescription | Descriptive information concerning the Fiduciary Officer position. | Optional | 0 to 1 | Non-null string |
| DateSpan | A date span with a “begin” and optional “end” date. | Optional | 0 to more |  |
| AnnualCompensationAmount | The annual compensation amount.   Attributes:       *year* - The year in which the compensation was earned  *type* - Valid values are Actual and Estimated. (Allowed values: Actual, Estimated)       *valuationDate* - The date the value was assessed.      *currencyCode* - The currency code of the amount indicated. Recommended values are ISO 4217 3-letter alphabetic codes. For example, USD for US dollar, CAD for the Canadian dollar, and EUR for the Euro. Valid values are limited to 3-character strings. | Optional | 0 to more | Non-null string |
| FormOfCompensation | The form of compensation that an individual receives.   Allowed Values:      Cash     Equity     Equity Options     Ownership     Unpaid     Other | Optional | 0 to 6 | Restricted |
| OtherFormOfCompensation | The form of compensation that an individual receives. The "OtherFormOfCompensation" element should be used when the value of "FormOfCompensation" element is equal to "Other". | Optional | 0 to 1 | Non-null string |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

**Example:**

<FiduciaryOfficer>  
 <Title>Board Member</Title>  
 <DateSpan>  
 <BeginDate>2010-01-01</BeginDate>  
 </DateSpan>  
 <AnnualCompensationAmount>2500</AnnualCompensationAmount>  
 <FormOfCompensation>Other</FormOfCompensation>  
</FiduciaryOfficer>

## FinancialSupport

**FinancialSupport** describes financial support that includes grants, travel, and gifts.

******

FinancialSupport Information

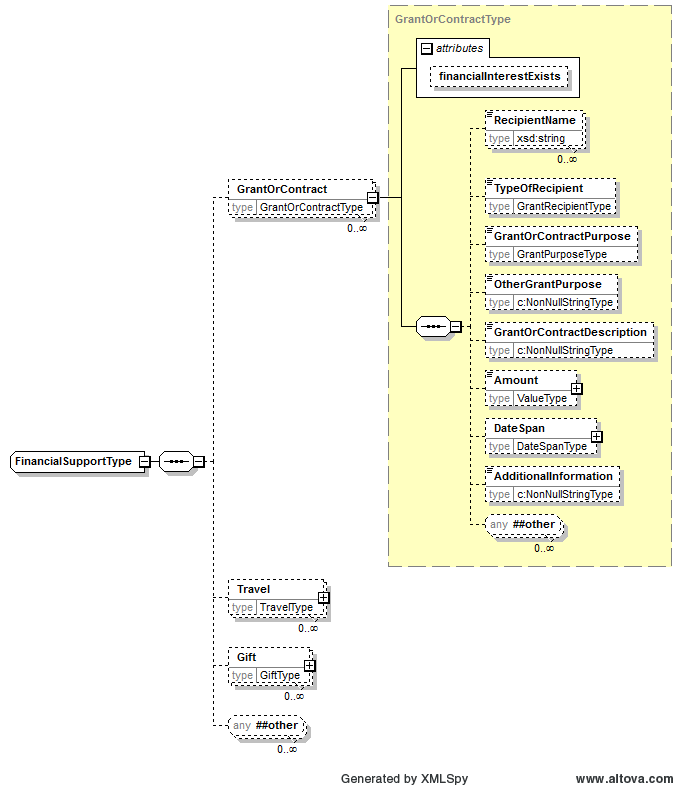
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| FinancialSupport | Contains sub-elements that describe financial support, including grants, travel, and gifts. | Optional | 0 to more | Container |
| GrantOrContract | Contains sub-elements that describe a grant or contract from an entity.    Attributes:      *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization.  For more information, see section GrantOrContract. | Optional | 0 to more | Container |
| Travel | Contains sub-elements that describe travel paid for by an entity.   Attributes:      *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization.  For more information, see section Travel. | Optional | 0 to more | Container |
| Gift | Contains sub-elements that describe a gift from an entity.   Attributes:      *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization.  For more information, see section Gift. | Optional | 0 to more | Container |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

Example:

<FinancialSupport>  
 <GrantOrContract>  
 ...  
 </GrantOrContract>  
 <Travel>  
 ...  
 </Travel>  
 <Gift>  
 ...  
 </Gift>  
</FinancialSupport>

### GrantOrContract

GrantOrContract describe a grant or contract from an entity. 



GrantOrContract Information

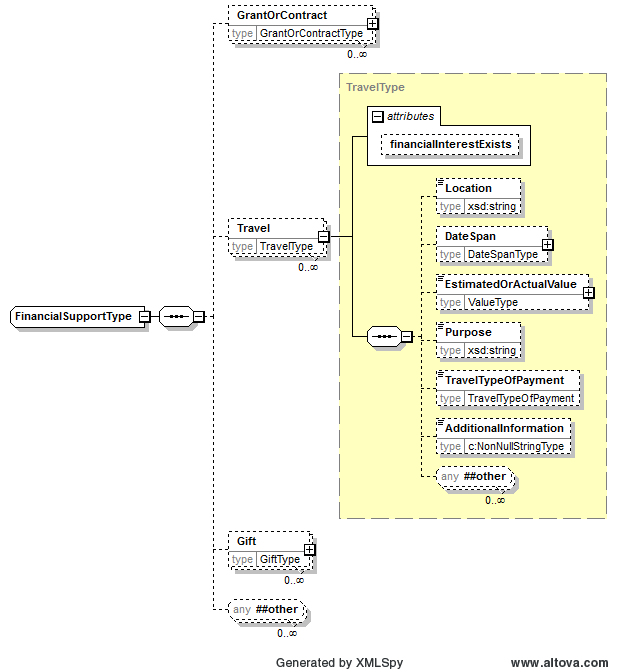
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **GrantOrContract** | Contains sub-elements that describe a grant or contract from an entity.   Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | Container |
| RecipientName | The name of the entity receiving a grant. | Optional | 0 to more | Non-null string |
| TypeOfRecipient | Indicates whether the grant was received by the individual or institution.    Allowed Values*:*       Individual      Institution | Optional | 0 to 1 | Restricted |
| GrantOrContractPurpose | The purpose of the grant.   Allowed Values:       Research      Other | Optional | 0 to 1 | Restricted |
| OtherGrantPurpose | The purpose of the grant or contract. This element should be used when the value of the GrantOrContractPurpose is Other. | Optional | 0 to 1 | Non-null string |
| GrantOrContractDescription | A description of the grant or contract, potentially including the title. | Optional | 0 to 1 | Non-null string |
| Amount | The total amount of the grant.   Attributes*:*       *currencyCode* - The currency code of the amount indicated. Recommended values are ISO 4217 3-letter alphabetic codes. For example, USD for US dollar, CAD for the Canadian dollar, and EUR for the Euro. Valid values are limited to 3-character strings.      *valuationDate* - The date the value was assessed. | Optional | 0 to 1 | Integer |
| **DateSpan** | A date span with a “begin” and optional “end” date.  For more information, see section DateSpan. | Optional | 0 to 1 | Container |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

Example:

<FinancialSupport>  
 <GrantOrContract>  
 <RecipientName>George Washington</RecipientName>  
 <TypeOfRecipient>Individual</TypeOfRecipient>  
 <GrantOrContractPurpose>Research</GrantOrContractPurpose>  
 <Amount>2500</Amount>  
 <DateSpan>  
 <BeginDate>2011-01-01</BeginDate>  
 <EndDate>2011-12-30</EndDate>  
 </DateSpan>  
 </GrantOrContract>  
 <GrantOrContract>  
 <RecipientName>University A</RecipientName>  
 <TypeOfRecipient>Institution</TypeOfRecipient>  
 <GrantOrContractPurpose>Research</GrantOrContractPurpose>  
 <Amount>5000</Amount>  
 <DateSpan>  
 <BeginDate>2013-01-01</BeginDate>  
 <EndDate>2014-12-30</EndDate>  
 </DateSpan>  
 </GrantOrContract>  
</FinancialSupport>

### **Travel**

**Travel** is the amount travel paid for by an entity.



Travel Information

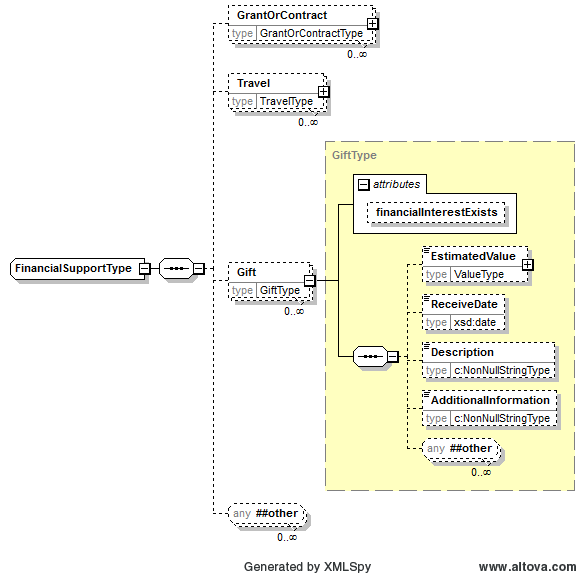
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **Travel** | Contains sub-elements that describe travel paid for by an entity.  Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | Container |
| Location | The location(s) to which the travel occurred. | Optional | 0 to 1 | Non-null string |
| **DateSpan** | A date span with a “begin” and optional “end” date.  For more information, see section DateSpan. | Optional | 0 to 1 | Container |
| EstimatedOrActualValue | The estimated or actual value of the travel.    Attributes:       *currencyCode* - The currency code of the amount indicated. Recommended values are ISO 4217 3-letter alphabetic codes. For example, USD for US dollar, CAD for the Canadian dollar, and EUR for the Euro. Valid values are limited to 3-character strings.      *valuationDate* - The date the value was assessed. | Optional | 0 to 1 | Integer |
| Purpose | The purpose of the travel. | Optional | 0 to 1 | Non-null string |
| TravelTypeOfPayment | An indication as to whether the travel was sponsored, where the entity paid for the travel up front, or reimbursed, where the individual paid for the travel and was then reimbursed by the entity.   Allowed Values:     Sponsored    Reimbursed | Optional | 0 to 1 | Restricted |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

Example:

<Travel>  
 <Location>San Diego, Ca.</Location>  
 <DateSpan>  
 <BeginDate>2014-03-12</BeginDate>  
 <EndDate>2014-03-17</EndDate>  
 </DateSpan>  
 <EstimatedValue currencyCode="US" valuationDate="2014-03-17">6000</EstimatedValue>  
 <Purpose>Presentation at conference</Purpose>  
 <TravelTypeOfPayment>Reimbursed</TravelTypeOfPayment>  
</Travel>

### **Gift**

Gift is the gift from an entity.

******

Gift Information

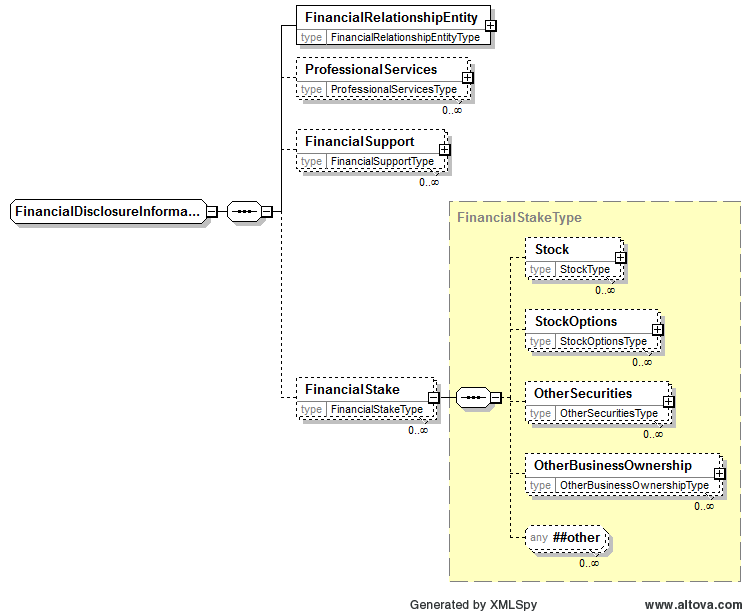
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **Gift** | Contains sub-elements that describe a gift from an entity. Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | Container |
| EstimatedValue | The estimated value of the gift.    Attributes:       *currencyCode* - The currency code of the amount indicated. Recommended values are ISO 4217 3-letter alphabetic codes. For example, USD for US dollar, CAD for the Canadian dollar, and EUR for the Euro. Valid values are limited to 3-character strings.      *valuationDate* - The date the value was assessed. | Optional | 0 to 1 | Integer |
| ReceiveDate | The date the gift is received. | Optional | 0 to 1 | Date |
| Description | A description of the gift. | Optional | 0 to 1 | Non-null string |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

**Example:**

<Gift>  
 <EstimatedValue currencyCode="US" valuationDate="2014-06-06">1000</EstimatedValue>  
 <ReceiveDate>2014-06-06</ReceiveDate>  
 <Description>Hip Replacement Device</Description>  
</Gift>

## FinancialStake

**FinancialStake** defines financial stake in an entity.

******

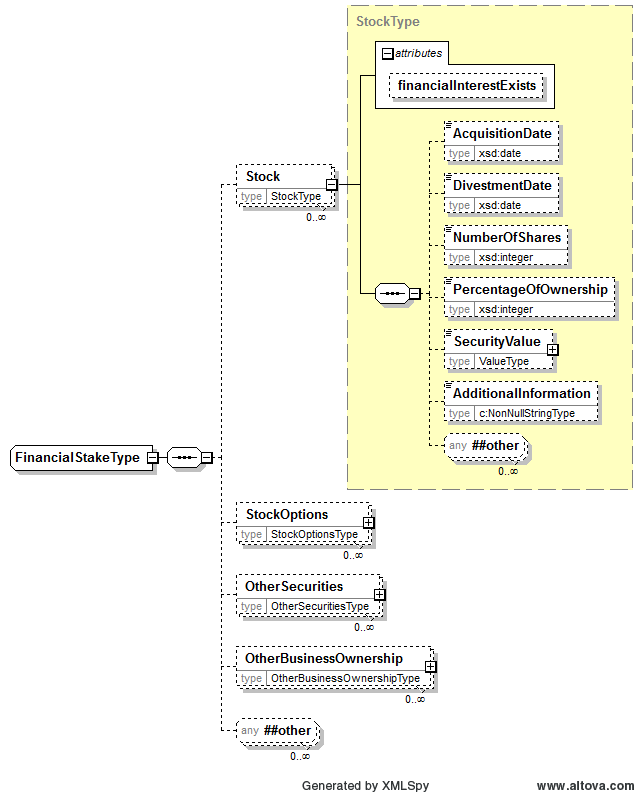
FinancialStake Information

| **Element** | **Description** | **Required** | **Multiplicity** | **Datatype** | |
| --- | --- | --- | --- | --- | --- |
| **FinancialStake** | Contains sub-elements that define financial stake in an entity, including stocks, stock options, other securities, and ownership. | Optional | 0 to more | | Container |
| **Stock** | Contains sub-elements that define stock held in an entity.  Attributes:  *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization.  For more information, see section Stock. | Optional | 0 to more | | Container |
| **StockOptions** | Contains sub-elements that define stock options for an entity in detail.     Attributes:    *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization.  For more information, see section Stock Options. | Optional | 0 to more | | Container |
| **OtherSecurities** | Details on securities that are not stock or stock options, i.e., bonds, convertible securities, etc.    Attributes:      *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization.  For more information, see section OtherSecurities. | Optional | 0 to more | | Container |
| **OtherBusinessOwnership** | Contains sub-elements that describe whole or partial ownership of an entity.    Attributes:   *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization.  For more information, see section OtherBusinessOwnership. | Optional | 0 to more | | Container |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | | Any datataype |

**Example:**

<FinancialStake>  
 <Stock>  
 ...  
 </Stock>  
 <StockOptions>  
 ...  
 </StockOptions>  
 <OtherSecurities>  
 ...  
 </OtherSecurities>   
 <OtherBusinessOwnership>  
 ...  
 </OtherBusinessOwnership>  
</FinancialStake>

### **Stock**

**Stock** defines stock held in an entity.  


Stock Information

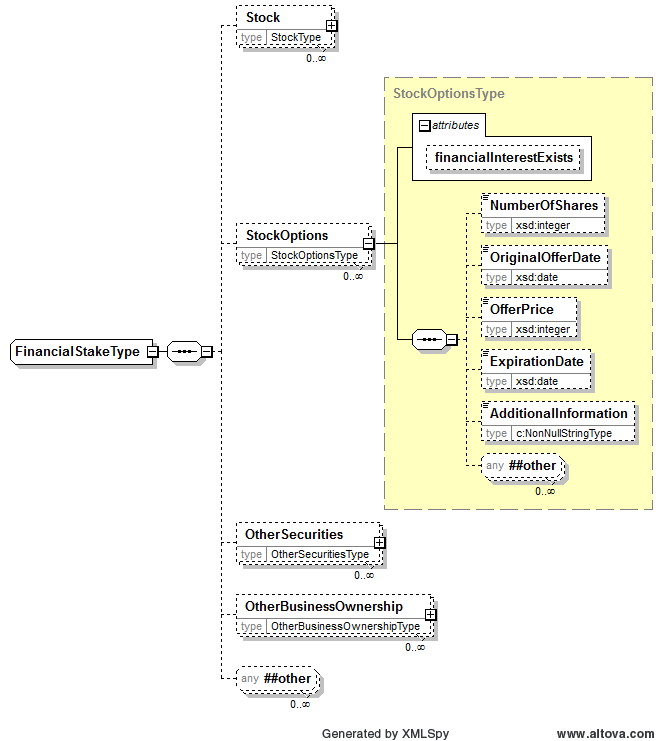
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **Stock** | Contains sub-elements that define stock held in an entity. Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | Container |
| AcquisitionDate | The date of acquisition of the security. | Optional | 0 to 1 | Date |
| DivestmentDate | The date of divestment of the security. | Optional | 0 to 1 | Date |
| NumberOfShares | The total number of shares owned. | Optional | 0 to 1 | Number |
| PercentageOfOwnership | The percentage of ownership. Mainly used for privately held companies. | Optional | 0 to 1 | Number |
| **SecurityValue** | The value of the security at the time the disclosure is completed.    Attributes:       *currencyCode* - The currency code of the amount indicated. Recommended values are ISO 4217 3-letter alphabetic codes. For example, USD for US dollar, CAD for the Canadian dollar, and EUR for the Euro. Valid values are limited to 3-character strings.      *valuationDate* - The date the value was assessed. | Optional | 0 to 1 | Integer |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

Example:

<FinancialStake>  
 <Stock>  
 <AcquisitionDate>2012-03-15</AcquisitionDate>  
 <DivestmentDate>2014-09-12</DivestmentDate>  
 </Stock>  
 <Stock>  
 <AcquisitionDate>2013-02-15</AcquisitionDate>  
 <NumberOfShares>200</NumberOfShares>  
 <SecurityValue valuationDate="2014-01-01">260000</SecurityValue>  
 </Stock>  
 </FinancialStake>

### **StockOptions**

**StockOptions** defines stock options for an entity.



StockOptions Information

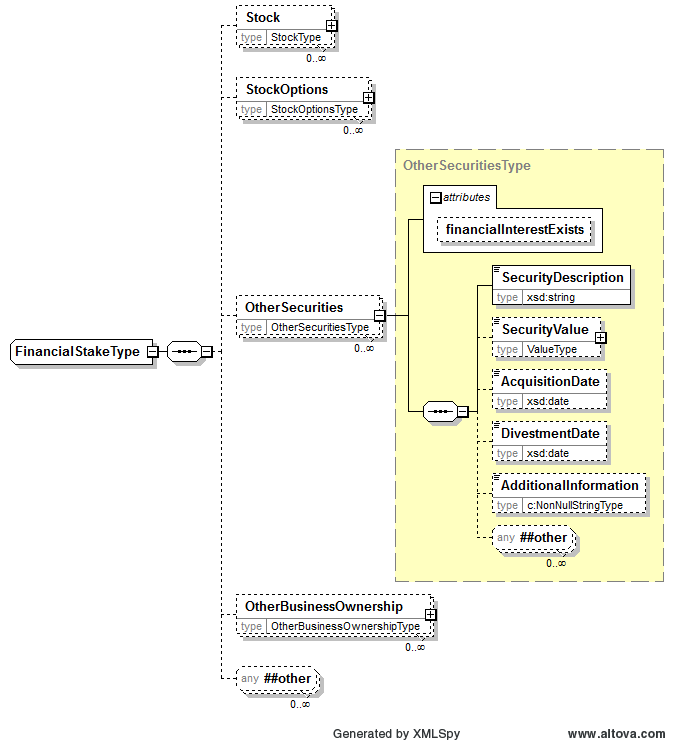
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **StockOptions** | Contains sub-elements that define stock options for an entity in detail.  Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | Container |
| NumberOfShares | The total number of shares owned. | Optional | 0 to 1 | Number |
| OriginalOfferDate | The date the stock options were offered. | Optional | 0 to 1 | Date |
| OfferPrice | The offer price of the stock options. | Optional | 0 to 1 | Number |
| ExpirationDate | The date the stock options will expire. | Optional | 0 to 1 | Date |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

Example:

<StockOptions>   
 <NumberOfShares>1000</NumberOfShares>  
 <OriginalOfferDate>2015-06-30</OriginalOfferDate>  
 <OfferPrice>10</OfferPrice>  
 <ExpirationDate>2017-01-01</ExpirationDate>  
</StockOptions>

### **OtherSecurities**

**OtherSecurities** identifies securities that are not stock or stock options.



OtherSecurities Information

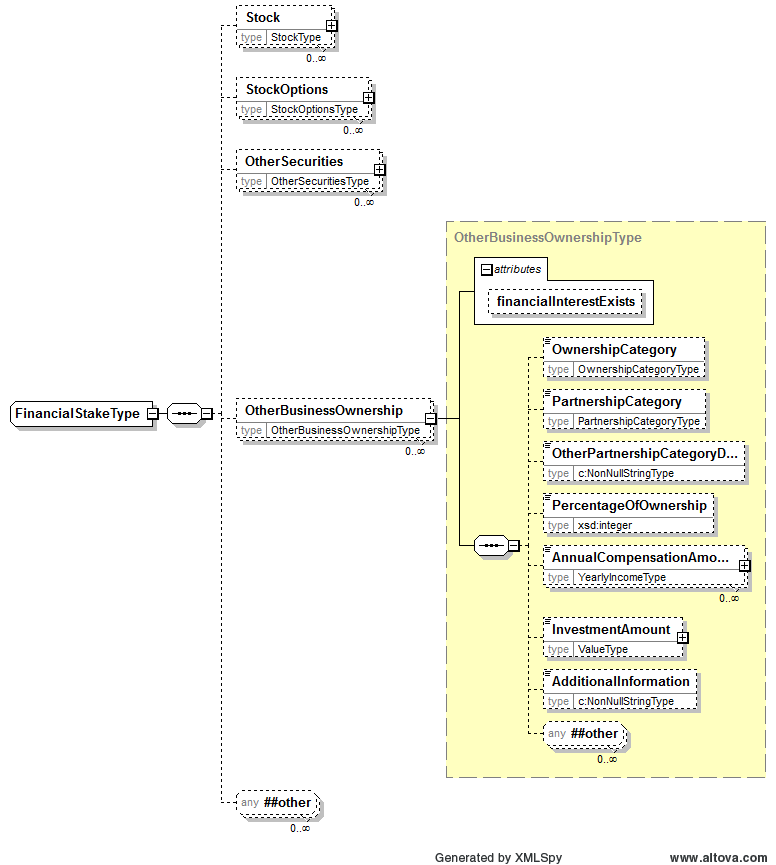
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **OtherSecurities** | Details on securities that are not stock or stock options, i.e., bonds, convertible securities, etc.   Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | Container |
| SecurityDescription | A Non-null string description of the held security. | Required | 1 to 1 | Non-null string |
| SecurityValue | The estimated value of the security.    Attributes:       *currencyCode* - The currency code of the amount indicated. Recommended values are ISO 4217 3-letter alphabetic codes. For example, USD for US dollar, CAD for the Canadian dollar, and EUR for the Euro. Valid values are limited to 3-character strings.      *valuationDate* - The date the value was assessed. | Optional | 0 to 1 | Integer |
| AcquisitionDate | The date of acquisition of the security. | Optional | 0 to 1 | Date |
| DivestmentDate | The date of divestment of the security. | Optional | 0 to 1 | Date |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

Example:

<OtherSecurities>  
 <SecurityDescription>Municipal Bonds</SecurityDescription>  
 <SecurityValue valuationDate="2014-03-03">5000</SecurityValue>  
 <AcquisitionDate>2012-01-12</AcquisitionDate>  
 <DivestmentDate>2014-12-03</DivestmentDate>  
</OtherSecurities>

### **OtherBusinessOwnership**

**OtherBusinessOwnership** describes whole or partial ownership of an entity.



OtherBusinessOwnership Information

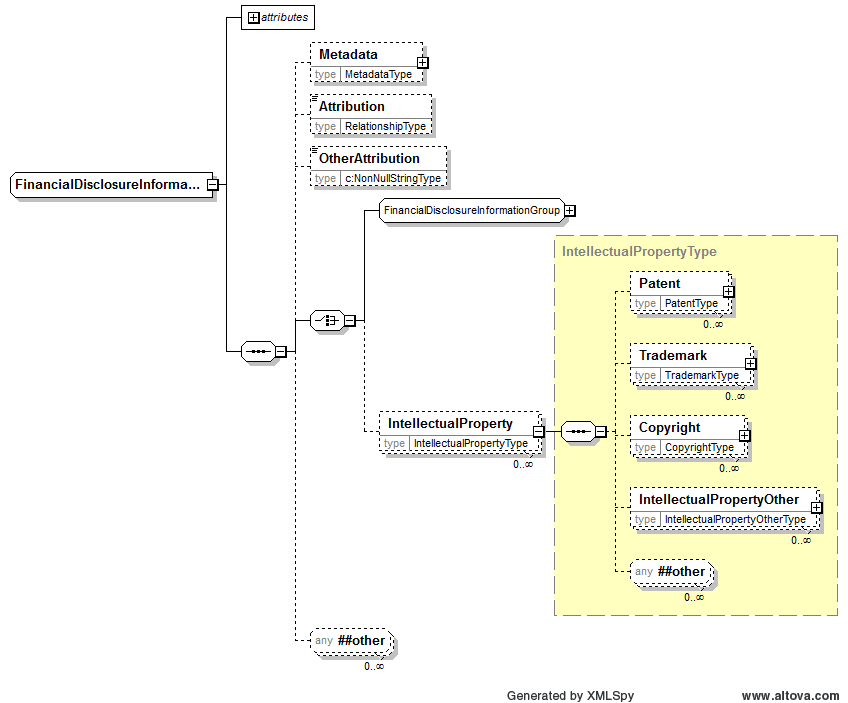
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **OtherBusinessOwnership** | Contains sub-elements that describe whole or partial ownership of an entity.  Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | Container |
| FormOfBusinessDescription | A Non-null string description of the form of business. | Optional | 0 to 1 | Non-null string |
| OwnershipCategory | The ownership category.   Allowed Values:       SoleProprietor      Partnership      Founder | Optional | 0 to 1 | Restricted |
| PartnershipCategory | The legal type of business.   Allowed Values:      Corporation  Limited Liability Company  Limited Partnership  Other | Optional | 0 to 1 | Restricted |
| OtherPartnershipCategoryDescription | The legal type of business. The 'OtherPartnershipCategoryDescription' element should be used if the element "PartnershipCategory" is equal to "Other". | Optional | 0 to 1 | Non-null string |
| PercentageOfOwnership | The percentage of ownership. Mainly used for privately held companies. | Optional | 0 to 1 | Number |
| AnnualCompensationAmount | The annual compensation amount.    Attributes:       *year* - The year in which the compensation was earned.      *type* - Valid values are Actual and Estimated. (Allowed values: Actual, Estimated)       *valuationDate* - The date the value was assessed.      *currencyCode* - The currency code of the amount indicated. Recommended values are ISO 4217 3-letter alphabetic codes. For example, USD for US dollar, CAD for the Canadian dollar, and EUR for the Euro. Valid values are limited to 3-character strings. | Optional | 0 to more | Integer |
| InvestmentAmount | The amount of money invested in the organization.   Attributes:       *currencyCode* - The currency code of the amount indicated. Recommended values are ISO 4217 3-letter alphabetic codes. For example, USD for US dollar, CAD for the Canadian dollar, and EUR for the Euro. Valid values are limited to 3-character strings.      *valuationDate* - The date the value was assessed. | Optional | 0 to 1 | Integer |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

Example:

<OtherBusinessOwnership>   
 <OwnershipCategory>Partnership</OwnershipCategory>  
 <PartnershipCategory>SCorp</PartnershipCategory>  
 <OtherPartnershipCategoryDescription>Non-null string Description</OtherPartnershipCategoryDescription>  
 <PercentageOfOwnership>49</PercentageOfOwnership>  
 <AnnualCompensationAmount year="2014" type="Actual" currencyCode="US">10000</AnnualCompensationAmount>  
 <AnnualCompensationAmount year="2015" type="Estimated" currencyCode="US">120000</AnnualCompensationAmount>  
 <InvestmentAmount>120000</InvestmentAmount>  
</OtherBusinessOwnership>

## **IntellectualProperty**

**IntellectualProperty** relates to intellectual property held.



IntellectualProperty Information

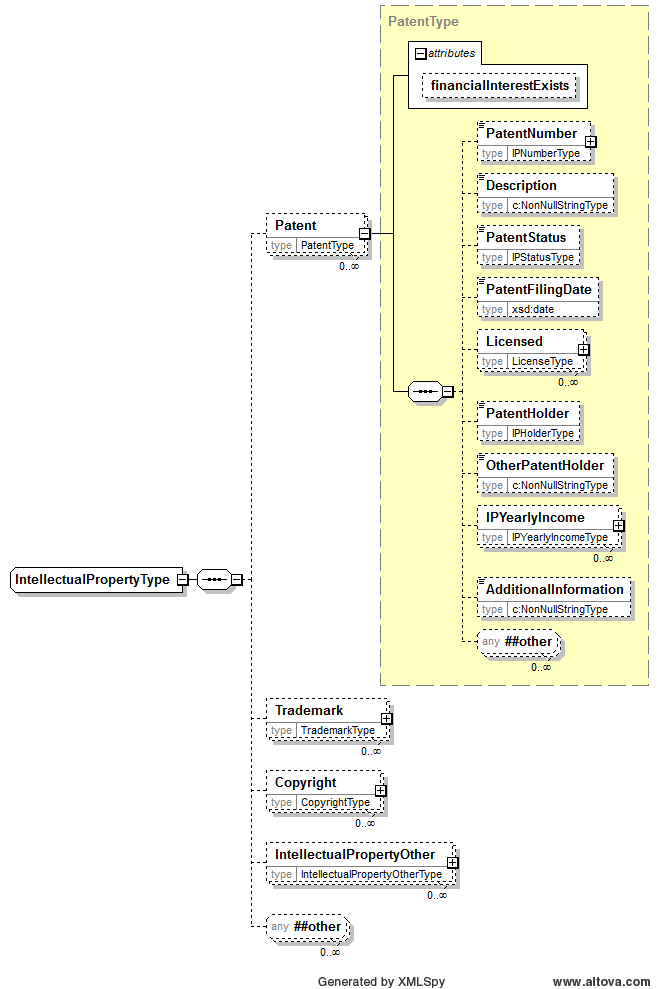
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| IntellectualProperty | Information on intellectual property held, including patents, copyrights, trademarks, and other intellectual property. | Optional | 0 to more | Container |
| Patent | Contains sub-elements that describe information on a patent held and associated income.    Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization.  For more information, see section Patent. | Optional | 0 to more | Container |
| Trademark | Contains sub-elements that describe a trademark held and associated income.   Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization.  For more information, see section Trademark. | Optional | 0 to more | Container |
| Copyright | Contains sub-elements that describe copyright and associated income.   Attributes:  *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization.  For more information, see section Copyright. | Optional | 0 to more | Container |
| IntellectualPropertyOther | Contains sub-elements that describe intellectual property other than patent, trademark, or copyright and the income associated with that intellectual property.    Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization.  For more information, see section IntellectualPropertyOther. | Optional | 0 to more | Container |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

Example:

<IntellectualProperty>  
 <Patent>  
 ...  
 </Patent>  
 <Trademark>  
 ...  
 </Trademark>  
 <Copyright>  
 ...  
 </Copyright>  
 <IntellectualPropertyOther>  
 ...  
 </IntellectualPropertyOther>  
</IntellectualProperty>

### **Patent**

**Patent** includes information on a patent held and associated income.

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Patent Information

| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **Patent** | Contains sub-elements that describe information on a patent held and associated income.  Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | Container |
| PatentNumber | The number assigned by the organization approving the patent.     Attributes:       *filingJurisdiction* - The jurisdiction where the intellectual property was filed. | Optional | 0 to 1 | Non-null string |
| Description | A description of the patent. | Optional | 0 to 1 | Non-null string |
| PatentStatus | The status of the intellectual property.   Allowed Values:     Provisional    Pending    Issued | Optional | 0 to 1 | Restricted |
| PatentFilingDate | The filing date of the patent. | Optional | 0 to 1 | Date |
| **Licensed** | Contains sub-elements that describe licensing of the intellectual property. For more information, see section Licensed. | Optional | 0 or more | Container |
| PatentHolder | Whether the patent is held by an individual or an organization.   Allowed Values:    Discloser   Current Institution   Previous Institution   Other Organization | Optional | 0 to 1 | Restricted |
| OtherPatentHolder | Whether the patent is held by an individual or an organization. The "OtherPatentHolder" element should be used when the value of the element "PatentHolder" is equal to "Other Organization". | Optional | 0 to 1 | Non-null string |
| **IPYearlyIncome** | Contains subelements that describe the yearly income and how the payment to the disclosing individual was processed. For more information, see section IPYearlyIncome. | Optional | 0 to more | Container |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

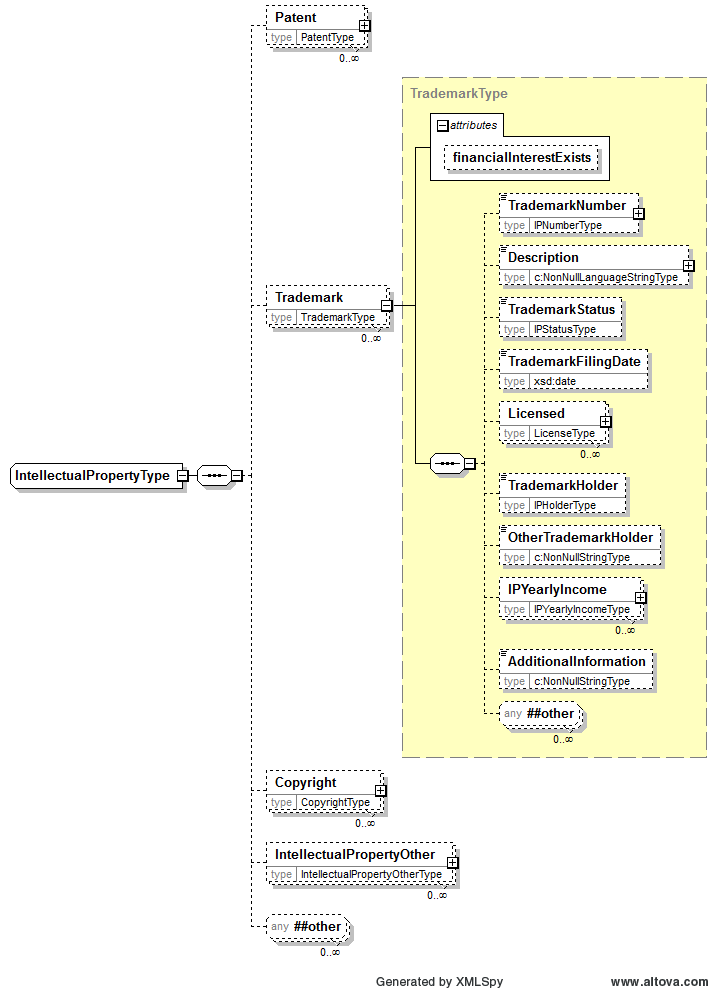
**Example:**

<Patent>  
 <PatentNumber>PTO456-a-123</PatentNumber>  
 <Description>Patent for titanium widget</Description>  
 <PatentFilingDate>2013-05-28</PatentFilingDate>  
 <Licensed>  
 <LicenseTitle>Worldwide Widget Manufacturing</LicenseTitle>  
 <LicenseDate>2014-06-12</LicenseDate>  
 </Licensed>  
 <PatentHolder>Discloser</PatentHolder>  
 <!--The yearly income has 3 attributes, 'currencyCode', 'type' and 'year'. Multiple years can been included-->

<IPYearlyIncome>  
 <YearlyIncome currencyCode="US" type="Actual" year="2013">2000</YearlyIncome>  
 <PaymentProcessing>direct payment</PaymentProcessing>

</IPYearlyIncome>  
</Patent>

### Trademark

**Trademark** includes information on trademark held and associated income.  


Trademark Information

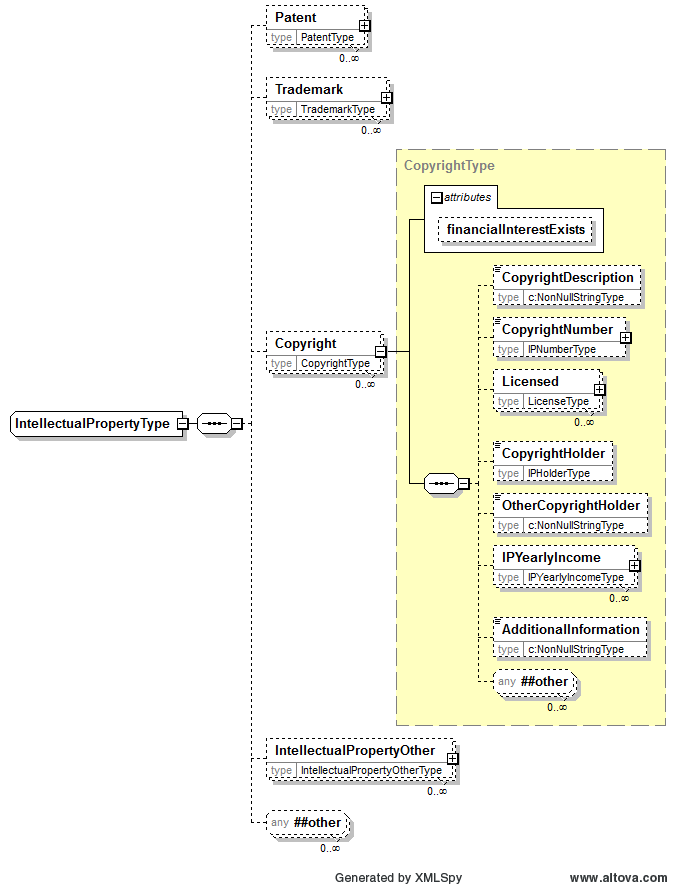
| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **Trademark** | Contains sub-elements that describe a trademark held and associated income.  Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | Container |
| TrademarkNumber | The number assigned by the organization approving the trademark.    Attributes:            *filingJurisdiction* - The jurisdiction where the intellectual property was filed. | Optional | 0 to 1 | Non-null string |
| Description | A description of the trademark. | Optional | 0 to 1 | Non-null string |
| TrademarkStatus | The status of the intellectual property.   Allowed Values:     Provisional    Pending    Issued | Optional | 0 to 1 | Restricted |
| TrademarkFilingDate | The filing date of the trademark. | Optional | 0 to 1 | Date |
| **Licensed** | Contains sub-elements that describe licensing of the intellectual property.  For more information, see section Licensed. | Optional | 0 or more | Container |
| TrademarkHolder | Whether the trademark is held by an individual or an organization.   Allowed Values*:*      Discloser     Current Institution     Previous Institution     Other Organization | Optional | 0 to 1 | Restricted |
| OtherTrademarkHolder | Whether the trademark is held by an individual or an organization. The "OtherTrademarkHolder" element should be used when the value of the element "TrademarkHolder" is equal to "Other Organization". | Optional | 0 to 1 | Non-null string |
| **IPYearlyIncome** | Contains subelements that describe the yearly income and how the payment to the disclosing individual was processed. For more information, see section IPYearlyIncome. | Optional | 0 to more | Container |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

Example:

<Trademark>  
 <TrademarkNumber>TM-123</TrademarkNumber>  
 <TrademarkStatus>Issued</TrademarkStatus>  
 <TrademarkFilingDate>2013-06-18</TrademarkFilingDate>  
 <Licensed>  
 <LicenseTitle>Worldwide Widget Manufacturing</LicenseTitle>  
 <LicenseDate>2014-06-12</LicenseDate>  
 </Licensed>  
 <TrademarkHolder>Previous Institution</TrademarkHolder>  
 <IPYearlyIncome>  
 <YearlyIncome currencyCode="US" type="Actual" year="2013">2000</YearlyIncome>  
 <PaymentProcessing>direct payment</PaymentProcessing>

</IPYearlyIncome>  
</Trademark>

### **Copyright**

**Copyright** includes information on copyright and associated income.  
******

Copyright Information

| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **Copyright** | Contains sub-elements that describe copyright and associated income.  Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | Container |
| CopyrightDescription | Descriptive information concerning the copyright. | Optional | 0 to 1 | Non-null string |
| CopyrightNumber | The number assigned by the copyright approval organization of a specific copyright.    Attributes:       *filingJurisdiction* - The jurisdiction where the intellectual property was filed. | Optional | 0 to 1 | Non-null string |
| CopyrightHolder | Whether the copyright is held by an individual or an organization.   Allowed Values:      Discloser     Current Institution     Previous Institution     Other Organization | Optional | 0 to 1 | Restricted |
| OtherCopyrightHolder | Whether the copyright is held by an individual or an organization. The "OtherCopyrightHolder" element should be used when the value of the element "CopyrightHolder" is equal to "Other Organization". | Optional | 0 to 1 | Non-null string |
| **IPYearlyIncome** | Contains subelements that describe the yearly income and how the payment to the disclosing individual was processed. For more information, see section IPYearlyIncome. | Optional | 0 to more | Container |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

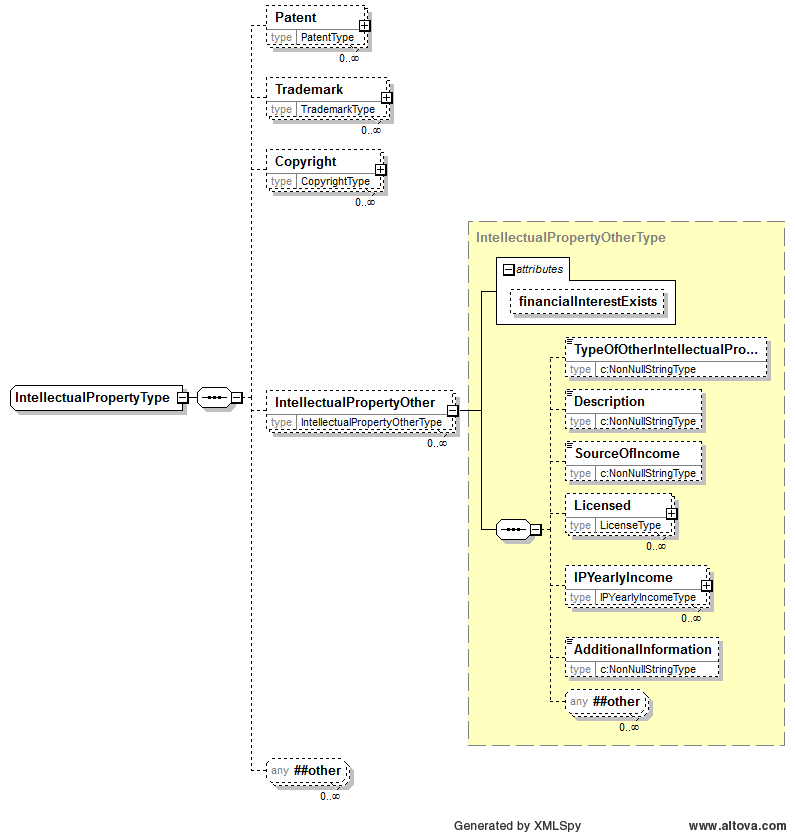
Example:

<Copyright>  
 <CopyrightNumber>VA 192-945</CopyrightNumber>  
 <CopyrightHolder>Discloser</CopyrightHolder>  
 <IPYearlyIncome>  
 <YearlyIncome currencyCode="US" type="Actual" year="2013">2000</YearlyIncome>  
 <PaymentProcessing>direct payment</PaymentProcessing>

</IPYearlyIncome>  
</Copyright>

### **IntellectualPropertyOther**

**IntellectualPropertyOther** describes intellectual property.



IntellectualPropertyOther Information

| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **IntellectualPropertyOther** | Contains sub-elements that describe intellectual property other than patent, trademark, or copyright and the income associated with that intellectual property.  Attributes:       *financialInterestExists* - The 'financialInterestExists' attribute can be used to show the existence of a financial interest. This attribute is optional and should be used when further information isn't required by organization. | Optional | 0 to more | Container |
| TypeOfOtherIntellectualProperty | Non-null string field for describing other types of intellectual properties. | Optional | 0 to 1 | Non-null string |
| Description | A description of the intellectual property. | Optional | 0 to 1 | Non-null string |
| SourceOfIncome | A description of the source of the income derived from the intellectual property. | Optional | 0 to 1 | Non-null string |
| **Licensed** | Contains sub-elements that describe licensing of the intellectual property.  For more information, see section Licensed. | Optional | 0 or more | Container |
| **IPYearlyIncome** | Contains subelements that describe the yearly income and how the payment to the disclosing individual was processed. For more information, see section IPYearlyIncome. | Optional | 0 to more | Container |
| AdditionalInformation | Any additional information about this interest | Optional | 0 or 1 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

Example:

<IntellectualPropertyOther>  
 <TypeOfOtherIntellectualProperty>Database</TypeOfOtherIntellectualProperty>  
 <Description>Database of patients during trial of ABC Titanium Hip Replacements</Description>  
 <SourceOfIncome>Licensing</SourceOfIncome>

<Licensed>

<Licensee>

<EntityReference>E0123</EntityReference>

<LicenseeDescription>ABC Co</LicenseeDescription>

<IPYearlyIncome>  
 <YearlyIncome currencyCode="US" type="Actual" year="2013">1200</YearlyIncome>  
 <PaymentProcessing>direct payment</PaymentProcessing>

</IPYearlyIncome>

</Licensee>

<Licensee>

<EntityReference>E0234</EntityReference>

<LicenseeDescription>ZYX Co</LicenseeDescription>

<IPYearlyIncome>  
 <YearlyIncome currencyCode="US" type="Actual" year="2013">800</YearlyIncome>  
 <PaymentProcessing>direct payment</PaymentProcessing>

</IPYearlyIncome>

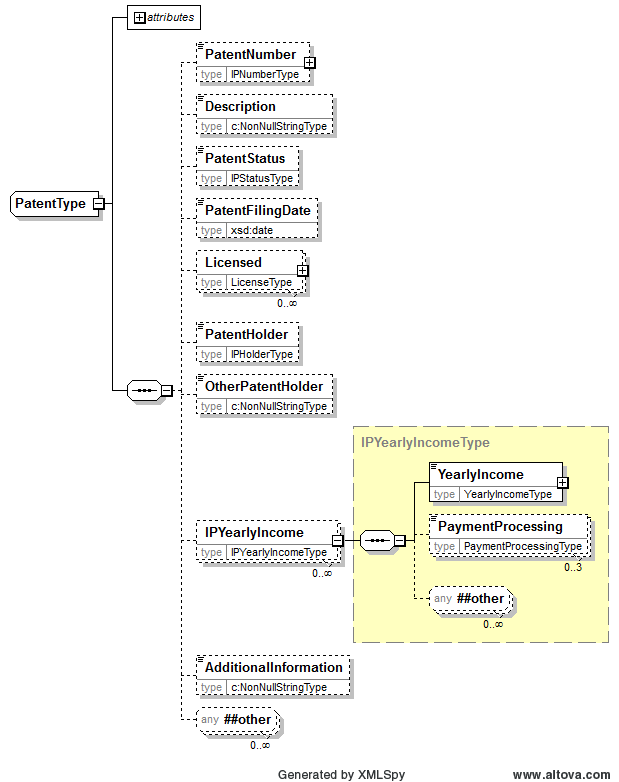
</Licensee>

</Licensed>  
 <IPYearlyIncome>  
 <YearlyIncome currencyCode="US" type="Actual" year="2013">2000</YearlyIncome>  
 <PaymentProcessing>direct payment</PaymentProcessing>

</IPYearlyIncome>  
</IntellectualPropertyOther>

### IPYearlyIncome

IPYearlyIncome contains subelements that describe the yearly income and how the payment to the disclosing individual was processed.



IPYearlyIncome Information

| Element | Description | Required | Multiplicity | Datatype |
| --- | --- | --- | --- | --- |
| **IPYearlyIncome** | Contains subelements that describe the yearly income and how the payment to the disclosing individual was processed. | Optional | 0 or more | Container |
| YearlyIncome | The actual or estimated annual income associated with intellectual property.   Attributes:      *year* - The year in which the compensation was earned.      *type* - Valid values are Actual and Estimated. (Allowed values: Actual, Estimated)       *valuationDate* - The date the value was assessed.      *currencyCode* - The currency code of the amount indicated. Recommended values are ISO 4217 3-letter alphabetic codes. For example, USD for US dollar, CAD for the Canadian dollar, and EUR for the Euro. Valid values are limited to 3-character strings. | Optional | 1 | Non-null string |
| PaymentProcessing | The way payments to the disclosing individual are processed. Valid values are direct payment, payment through home institution, and payment through other organization. | Optional | 0 to 3 | Non-null string |
| Any | Any elements defined by the organization implementing the schema provided those elements are defined in another namespace. | Optional | 0 or more | Any datataype |

# Sample XML Document

<?xml version="1.0" encoding="UTF-8"?>

<FinancialInterestPackages xmlns="http://ns.medbiq.org/Disclosure/v1/"

xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

xmlns:m="http://ns.medbiq.org/member/v1/"

xmlns:n="http://ns.medbiq.org/name/v1/"

xmlns:c="http://ns.medbiq.org/common/v2/"

xmlns:a="http://ns.medbiq.org/address/v1/"

xsi:schemaLocation="http://ns.medbiq.org/Disclosure/v1/ ../../../../Valerie&apos;s%20stuff/Xml/Financial%20interest/financialinterest.xsd">

<IndividualFinancialInterestPackage id="Package1">

<!--The <Metadata> element is required at the <IndividualFinancialInterestPackage> level and optional at the <FinancialInterestPackages>

and <FinancialDisclosureInformation> levels. -->

<!--The <DisclosureProfile> is used to define different types of profiles that can be identified in order to provide information

for different purposes, i.e. Journal Articles vs. employment conflict of interest.-->

<Metadata>

<DisclosureProfile>NEJM Manuscript Submission</DisclosureProfile>

<CreationInfo>

<CreationDateTime>2015-02-24T17:43:00</CreationDateTime>

<UniqueID domain="aamc">aamc1234</UniqueID>

</CreationInfo>

<UpdateInfo>

<UpdateDateTime>2015-02-28T12:19:00</UpdateDateTime>

<UniqueID domain="aamc">aamc1234</UniqueID>

</UpdateInfo>

</Metadata>

<DisclosingIndividual>

<UniqueID domain="aamc">aamc1234</UniqueID>

<UniqueID domain="NEJ">abcd1234</UniqueID>

<Name>

<n:Title>Dr.</n:Title>

<n:GivenName>George</n:GivenName>

<n:FamilyName>Washington</n:FamilyName>

<n:GenerationIdentifier>Jr.</n:GenerationIdentifier>

<n:Degree>MD</n:Degree>

</Name>

<Address>

<a:Organization>Washington Orthopedic Group</a:Organization>

<a:StreetAddressLine>2536 West Street</a:StreetAddressLine>

<a:City>Washington</a:City>

<a:StateOrProvince>DC</a:StateOrProvince>

<a:PostalCode>22222</a:PostalCode>

<a:Country>

<a:CountryCode>US</a:CountryCode>

</a:Country>

</Address>

<Email>George.Washington@washorthogroup.com</Email>

<Telephone>

<m:TelephoneNumber>410-555-1231</m:TelephoneNumber>

<m:Description>Home</m:Description>

</Telephone>

<Telephone>

<m:TelephoneNumber>401-555-1232</m:TelephoneNumber>

<m:Extension>222</m:Extension>

<m:Description>Office</m:Description>

</Telephone>

</DisclosingIndividual>

<FinancialDisclosureInformation id="Employment">

<!--This example provides information about an employment interest. -->

<FinancialRelationshipEntity>

<OrganizationEntity id="A001">

<OrganizationName>ABC Associates</OrganizationName>

<FormOfBusiness>Pharmaceutical Company</FormOfBusiness>

<Address>

<a:StreetAddressLine>1600 West Street, NW</a:StreetAddressLine>

<a:City>Providence</a:City>

<a:StateOrProvince>RI</a:StateOrProvince>

<a:PostalCode>22222</a:PostalCode>

<a:Country>

<a:CountryCode>US</a:CountryCode>

</a:Country>

</Address>

</OrganizationEntity>

</FinancialRelationshipEntity>

<ProfessionalServicesActivities>

<Employment>

<DateSpan>

<BeginDate>1999-01-01</BeginDate>

</DateSpan>

<AnnualCompensationAmount>175000</AnnualCompensationAmount>

<HourlyRate>60.50</HourlyRate>

<AverageHours>

<NumberOfHours>40</NumberOfHours>

<Duration>Week</Duration>

</AverageHours>

<FormOfCompensation>Cash</FormOfCompensation>

</Employment>

</ProfessionalServicesActivities>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="IndependentContractor">

<!--This example provides information about a consultancy.-->

<!--The <Attribution> Element defines who the disclosure relates too. It is an optional element and if it is blank the attribution is the person who the disclosure pertains.-->

<Attribution>Self</Attribution>

<FinancialRelationshipEntity>

<UniqueID domain="duns">Org123</UniqueID>

<OrganizationEntity id="A002">

<OrganizationName>Company A</OrganizationName>

<FormOfBusiness>Device Manufacturer</FormOfBusiness>

<ParentCompany>Corporation A</ParentCompany>

<ContactName>

<n:FormattedName>Joy Smith</n:FormattedName>

</ContactName>

<Address>

<a:StreetAddressLine>1600 B Street, NW</a:StreetAddressLine>

<a:City>Boston</a:City>

<a:StateOrProvince>MA</a:StateOrProvince>

<a:PostalCode>22222</a:PostalCode>

<a:Country>

<a:CountryCode>US</a:CountryCode>

</a:Country>

</Address>

<Telephone>

<m:CountryCode>1</m:CountryCode>

<m:TelephoneNumber>888-888-8881</m:TelephoneNumber>

</Telephone>

<Email>info@companya.com</Email>

</OrganizationEntity>

</FinancialRelationshipEntity>

<ProfessionalServices>

<OtherProfessionalActivities>

<ContractorCategory>Consultant</ContractorCategory>

<ActivityDateSpan>

<BeginDate>2013-03-15</BeginDate>

<EndDate>2014-12-30</EndDate>

</ActivityDateSpan>

<!--The content of <AnnualCompensationAmount year="2013" type="Actual" currencyCode="US"> includes 3 attributes for

defining the year, type compensation and currency code. Multiple <AnnualCompensationAmount> elements are allowed

whenever the element is allowed.-->

<AnnualCompensationAmount year="2013" type="Actual" currencyCode="US">5000</AnnualCompensationAmount>

<AnnualCompensationAmount year="2014" type="Estimated" currencyCode="US">10000</AnnualCompensationAmount>

<FormOfCompensation>Equity</FormOfCompensation>

</OtherProfessionalActivities>

</ProfessionalServices>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="FiduciaryOfficer">

<!--In this example, the individual is a Fiduciary Officer of a corporation.-->

<Metadata>

<DisclosureProfile>NEJM Manuscript Submission </DisclosureProfile>

<CreationInfo>

<CreationDateTime>2015-02-25T09:20:10</CreationDateTime>

<UniqueID domain="aamc">AAMC456</UniqueID>

</CreationInfo>

</Metadata>

<FinancialRelationshipEntity>

<UniqueID domain="aamc">Org456</UniqueID>

<OrganizationEntity id="A010">

<OrganizationName>ABC Corporation</OrganizationName>

<FormOfBusiness>Medical Supply Company</FormOfBusiness>

<ContactName>

<n:FormattedName>Ben Franklin</n:FormattedName>

</ContactName>

<Address>

<a:StreetAddressLine>100 First Street</a:StreetAddressLine>

<a:City>Washington</a:City>

<a:StateOrProvince>DC</a:StateOrProvince>

<a:PostalCode>22222</a:PostalCode>

<a:Country>

<a:CountryCode>US</a:CountryCode>

</a:Country>

</Address>

<Telephone>

<m:CountryCode>1</m:CountryCode>

<m:TelephoneNumber>888-888-8882</m:TelephoneNumber>

</Telephone>

<Email>departmenta@abc.edu</Email>

</OrganizationEntity>

</FinancialRelationshipEntity>

<ProfessionalServices>

<FiduciaryOfficer>

<Title>Board Member</Title>

<!--Date span has a begin and end date. If the end date is not included it is assumed that the relationship still exists.

If necessary we can add a choice between <EndDate> and Present.-->

<DateSpan>

<BeginDate>2010-01-01</BeginDate>

</DateSpan>

<AnnualCompensationAmount>2500</AnnualCompensationAmount>

<FormOfCompensation>Other</FormOfCompensation>

</FiduciaryOfficer>

</ProfessionalServices>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="GrantOrContract">

<!--This example, the designee has received a grant for research.-->

<Metadata>

<DisclosureProfile>NEJM Manuscript Submission </DisclosureProfile>

<CreationInfo>

<CreationDateTime>2015-03-06T11:20:10</CreationDateTime>

<UniqueID domain="aamc">aamc1234</UniqueID>

</CreationInfo>

</Metadata>

<Attribution>Self</Attribution>

<FinancialRelationshipEntity>

<OrganizationEntity id="A003">

<OrganizationName>ABC Drug Research</OrganizationName>

<Address>

<a:City>Bethesda</a:City>

<a:StateOrProvince>MD</a:StateOrProvince>

<a:Country>

<a:CountryCode>US</a:CountryCode>

</a:Country>

</Address>

</OrganizationEntity>

</FinancialRelationshipEntity>

<!--Multiple Grants can be included in a single Financial Disclosure if the grant organization is the same.-->

<FinancialSupport>

<GrantOrContract>

<RecipientName>George Washington</RecipientName>

<TypeOfRecipient>Individual</TypeOfRecipient>

<GrantOrContractPurpose>Research</GrantOrContractPurpose>

<Amount>2500</Amount>

<DateSpan>

<BeginDate>2011-01-01</BeginDate>

<EndDate>2011-12-30</EndDate>

</DateSpan>

</GrantOrContract>

<GrantOrContract>

<RecipientName>University A</RecipientName>

<TypeOfRecipient>Institution</TypeOfRecipient>

<GrantOrContractPurpose>Research</GrantOrContractPurpose>

<Amount>5000</Amount>

<DateSpan>

<BeginDate>2013-01-01</BeginDate>

<EndDate>2014-12-30</EndDate>

</DateSpan>

</GrantOrContract>

</FinancialSupport>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="GrantPerson">

<!--This example, the designee has received a grant for research from an individual.-->

<Metadata>

<CreationInfo>

<CreationDateTime>2015-03-23T12:50:10</CreationDateTime>

<UniqueID domain="aamc">aamc1234</UniqueID>

</CreationInfo>

</Metadata>

<Attribution>Self</Attribution>

<FinancialRelationshipEntity>

<PersonEntity id="P001">

<Name>

<n:Title>Dr.</n:Title>

<n:GivenName>Richie</n:GivenName>

<n:FamilyName>Rich</n:FamilyName>

</Name>

<Address>

<a:City>Manhattan</a:City>

<a:StateOrProvince>NY</a:StateOrProvince>

<a:Country>

<a:CountryCode>US</a:CountryCode>

</a:Country>

</Address>

<Telephone>

<m:TelephoneNumber>212-555-1212</m:TelephoneNumber>

</Telephone>

<Email>rrich@philanthropy.org</Email>

</PersonEntity>

</FinancialRelationshipEntity>

<!--Multiple Grants can be included in a single Financial Disclosure if the grant organization is the same.-->

<FinancialSupport>

<GrantOrContract>

<RecipientName>George Washington</RecipientName>

<TypeOfRecipient>Individual</TypeOfRecipient>

<GrantOrContractPurpose>Research</GrantOrContractPurpose>

<Amount>10000</Amount>

<DateSpan>

<BeginDate>2014-01-01</BeginDate>

<EndDate>2014-12-30</EndDate>

</DateSpan>

</GrantOrContract>

</FinancialSupport>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="Travel">

<!--This example, the designee has received reimbursement for travel-->

<Metadata>

<CreationInfo>

<CreationDateTime>2015-03-22T11:20:10</CreationDateTime>

<UniqueID domain="aamc">aamc1234</UniqueID>

</CreationInfo>

</Metadata>

<Attribution>Self</Attribution>

<FinancialRelationshipEntity>

<OrganizationEntity id="A011">

<OrganizationName>ABC Drug Research</OrganizationName>

<Address>

<a:City>Bethesda</a:City>

<a:StateOrProvince>MD</a:StateOrProvince>

<a:Country>

<a:CountryCode>US</a:CountryCode>

</a:Country>

</Address>

</OrganizationEntity>

</FinancialRelationshipEntity>

<FinancialSupport>

<Travel>

<Location>San Diego, Ca.</Location>

<DateSpan>

<BeginDate>2014-03-12</BeginDate>

<EndDate>2014-03-17</EndDate>

</DateSpan>

<EstimatedOrActualValue currencyCode="US" valuationDate="2014-03-17">6000</EstimatedOrActualValue>

<Purpose>Presentation at conference</Purpose>

<TravelTypeOfPayment>Reimbursed</TravelTypeOfPayment>

</Travel>

</FinancialSupport>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="Gift">

<!--This example, the designee has received a gift-->

<Metadata>

<CreationInfo>

<CreationDateTime>2015-03-22T11:20:10</CreationDateTime>

<UniqueID domain="aamc">aamc1234</UniqueID>

</CreationInfo>

</Metadata>

<Attribution>Self</Attribution>

<FinancialRelationshipEntity>

<OrganizationEntity id="A004">

<OrganizationName>DEF Medical Supply</OrganizationName>

<Address>

<a:City>Princeton</a:City>

<a:StateOrProvince>NJ</a:StateOrProvince>

<a:Country>

<a:CountryCode>US</a:CountryCode>

</a:Country>

</Address>

</OrganizationEntity>

</FinancialRelationshipEntity>

<FinancialSupport>

<Gift>

<EstimatedValue currencyCode="US" valuationDate="2014-06-06">1000</EstimatedValue>

<ReceiveDate>2014-06-06</ReceiveDate>

<Description>Hip Replacement Device</Description>

</Gift>

</FinancialSupport>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="Stock">

<!--This example provides information about ownership of stock. -->

<FinancialRelationshipEntity>

<UniqueID domain="NASDAQ">AAPL</UniqueID>

<OrganizationEntity id="A005">

<OrganizationName>Apple Corporation</OrganizationName>

<FormOfBusiness>IT Company</FormOfBusiness>

<CompanyCategory>Public</CompanyCategory>

<Address>

<a:StreetAddressLine>1 Infinite Loop</a:StreetAddressLine>

<a:City>Cupertino</a:City>

<a:StateOrProvince>CA</a:StateOrProvince>

<a:PostalCode>95014</a:PostalCode>

<a:Country>

<a:CountryCode>US</a:CountryCode>

</a:Country>

</Address>

<Telephone>

<m:TelephoneNumber>408-996-1010</m:TelephoneNumber>

</Telephone>

<Email>info@apple.com</Email>

</OrganizationEntity>

</FinancialRelationshipEntity>

<FinancialStake>

<Stock>

<AcquisitionDate>2012-03-15</AcquisitionDate>

<DivestmentDate>2014-09-12</DivestmentDate>

<!--

<NumberOfShares>100</NumberOfShares>

<ValueOfShares>13000</ValueOfShares>-->

</Stock>

<Stock>

<AcquisitionDate>2013-02-15</AcquisitionDate>

<NumberOfShares>200</NumberOfShares>

<SecurityValue valuationDate="2014-01-01">260000</SecurityValue>

</Stock>

</FinancialStake>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="StockOptions">

<!--This example provides information about stock options. -->

<FinancialRelationshipEntity>

<UniqueID domain="NYStockExchange">DEFA</UniqueID>

<OrganizationEntity id="A006">

<OrganizationName>DEF Medical Supply</OrganizationName>

<CompanyCategory>Public</CompanyCategory>

<Address>

<a:City>Princeton</a:City>

<a:StateOrProvince>NJ</a:StateOrProvince>

<a:Country>

<a:CountryCode>US</a:CountryCode>

</a:Country>

</Address>

</OrganizationEntity>

</FinancialRelationshipEntity>

<FinancialStake>

<StockOptions>

<NumberOfShares>1000</NumberOfShares>

<OriginalOfferDate>2015-06-30</OriginalOfferDate>

<OfferPrice>10</OfferPrice>

<ExpirationDate>2017-01-01</ExpirationDate>

</StockOptions>

</FinancialStake>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="OtherSecurities">

<!--This example provides information about types of securities that are not stocks or stock options. -->

<FinancialRelationshipEntity>

<OrganizationEntity id="A007">

<OrganizationName>ABC Municipal</OrganizationName>

<Address>

<a:City>Baltimore</a:City>

<a:StateOrProvince>MD</a:StateOrProvince>

<a:Country>

<a:CountryCode>US</a:CountryCode>

</a:Country>

</Address>

</OrganizationEntity>

</FinancialRelationshipEntity>

<FinancialStake>

<OtherSecurities>

<SecurityDescription>Municipal Bonds</SecurityDescription>

<SecurityValue valuationDate="2014-03-03">5000</SecurityValue>

<AcquisitionDate>2012-01-12</AcquisitionDate>

<DivestmentDate>2014-12-03</DivestmentDate>

</OtherSecurities>

</FinancialStake>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="OtherBusinessOwnership">

<!--This example, the designee is disclosing partial ownership of an entity.-->

<Metadata>

<CreationInfo>

<CreationDateTime>2015-02-25T13:20:10</CreationDateTime>

<UniqueID domain="aamc">aamc1234</UniqueID>

</CreationInfo>

</Metadata>

<FinancialRelationshipEntity>

<OrganizationEntity id="A008">

<OrganizationName>ABC Medical Supply, LLC</OrganizationName>

<FormOfBusiness>Medical Supply Company</FormOfBusiness>

<Address>

<a:City>Philadelphia</a:City>

<a:StateOrProvince>PA</a:StateOrProvince>

<a:Country>

<a:CountryCode>US</a:CountryCode>

</a:Country>

</Address>

</OrganizationEntity>

</FinancialRelationshipEntity>

<FinancialStake>

<OtherBusinessOwnership>

<OwnershipCategory>Partnership</OwnershipCategory>

<PartnershipCategory>Corporation</PartnershipCategory>

<OtherPartnershipCategoryDescription>Non-null string Description</OtherPartnershipCategoryDescription>

<PercentageOfOwnership>49</PercentageOfOwnership>

<AnnualCompensationAmount year="2014" type="Actual" currencyCode="US">10000</AnnualCompensationAmount>

<AnnualCompensationAmount year="2015" type="Estimated" currencyCode="US">120000</AnnualCompensationAmount>

<InvestmentAmount>120000</InvestmentAmount>

</OtherBusinessOwnership>

</FinancialStake>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="Patent">

<!--This example, the designee is disclosing a patent. The patent has been licensed and royalties received.-->

<Metadata>

<CreationInfo>

<CreationDateTime>2015-02-28T12:19:00</CreationDateTime>

<UniqueID domain="aamc">AAMC456</UniqueID>

</CreationInfo>

</Metadata>

<IntellectualProperty>

<Patent>

<PatentNumber>PTO456-a-123</PatentNumber>

<Description>Patent for titanium widget.</Description>

<PatentFilingDate>2013-05-28</PatentFilingDate>

<Licensed>

<LicenseTitle>Worldwide Widget Manufacturing</LicenseTitle>

<LicenseDate>2014-06-12</LicenseDate>

</Licensed>

<PatentHolder>Discloser</PatentHolder>

<!--The yearly income has 3 attributes, 'currencyCode', 'type' and 'year'. Multiple years can been included-->

<IPYearlyIncome>

<YearlyIncome currencyCode="US" type="Actual" year="2013">2000</YearlyIncome>

</IPYearlyIncome>

<IPYearlyIncome>

<YearlyIncome currencyCode="US" type="Estimated" year="2014">2000</YearlyIncome>

</IPYearlyIncome>

</Patent>

</IntellectualProperty>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="Trademark">

<!--This example, the designee is disclosing a trademark. The trademark has been licensed and royalties received.-->

<Metadata>

<CreationInfo>

<CreationDateTime>2015-02-28T12:19:00</CreationDateTime>

<UniqueID domain="aamc">AAMC456</UniqueID>

</CreationInfo>

</Metadata>

<IntellectualProperty>

<Trademark>

<TrademarkNumber>TM-123</TrademarkNumber>

<TrademarkStatus>Issued</TrademarkStatus>

<TrademarkFilingDate>2013-06-18</TrademarkFilingDate>

<Licensed>

<LicenseTitle>Worldwide Widget Manufacturing</LicenseTitle>

<LicenseDate>2014-06-12</LicenseDate>

</Licensed>

<TrademarkHolder>Previous Institution</TrademarkHolder>

<IPYearlyIncome>

<YearlyIncome>1000</YearlyIncome>

</IPYearlyIncome>

</Trademark>

</IntellectualProperty>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="Copyright">

<!--This example, the designee is disclosing a copyright. There are 2 Yearly Incomes, one actual and one estimated.-->

<Metadata>

<CreationInfo>

<CreationDateTime>2015-03-22T12:19:00</CreationDateTime>

<UniqueID domain="aamc">AAMC456</UniqueID>

</CreationInfo>

</Metadata>

<IntellectualProperty>

<Copyright>

<CopyrightNumber>VA 192-945</CopyrightNumber>

<CopyrightHolder>Discloser</CopyrightHolder>

<IPYearlyIncome>

<YearlyIncome currencyCode="US" type="Actual" year="2013">50</YearlyIncome>

</IPYearlyIncome>

<IPYearlyIncome>

<YearlyIncome currencyCode="US" type="Estimated" year="2014">100</YearlyIncome>

</IPYearlyIncome>

</Copyright>

</IntellectualProperty>

</FinancialDisclosureInformation>

<FinancialDisclosureInformation id="IntellectualPropertyOther">

<!--This example shows intellectual property that isn't a patent, copyright or trademark. This example shows a database.-->

<Metadata>

<CreationInfo>

<CreationDateTime>2015-03-23T12:19:00</CreationDateTime>

<UniqueID domain="aamc">AAMC456</UniqueID>

</CreationInfo>

</Metadata>

<IntellectualProperty>

<IntellectualPropertyOther>

<TypeOfOtherIntellectualProperty>Database</TypeOfOtherIntellectualProperty>

<Description>Database of patients during trial of ABC Titanium Hip Replacements.</Description>

<SourceOfIncome>Licensing</SourceOfIncome>

<IPYearlyIncome>

<YearlyIncome>1000</YearlyIncome>

</IPYearlyIncome>

</IntellectualPropertyOther>

</IntellectualProperty>

</FinancialDisclosureInformation>

</IndividualFinancialInterestPackage>

<IndividualFinancialInterestPackage id="Package2">

<!--This example shows another Financial Interest Package where only the information that a financial relationship exists -->

<Metadata>

<CreationInfo>

<CreationDateTime>2015-04-15T15:20:01</CreationDateTime>

<UniqueID domain="AAMC">Smith.John</UniqueID>

</CreationInfo>

</Metadata>

<DisclosingIndividual>

<Name>

<n:GivenName>John</n:GivenName>

<n:FamilyName>Smith</n:FamilyName>

</Name>

<Address><a:StreetAddressLine>1212 Ivory Lane</a:StreetAddressLine>

<a:City>Boston</a:City>

<a:StateOrProvince>MA</a:StateOrProvince>

<a:PostalCode>22222</a:PostalCode>

<a:Country>

<a:CountryName>United States</a:CountryName>

</a:Country>

</Address>

<Email>John.Smith@abc.org</Email>

<Telephone>

<m:TelephoneNumber>301-555-1212</m:TelephoneNumber>

</Telephone>

</DisclosingIndividual>

<FinancialDisclosureInformation id="EmptyContent">

<FinancialRelationshipEntity>

<OrganizationEntity id="A009">

<OrganizationName>ABC Corporation</OrganizationName>

<Address>

<a:StreetAddressLine>567 Security Boulevard</a:StreetAddressLine>

<a:City>Baltimore</a:City>

<a:StateOrProvince>MD</a:StateOrProvince>

<a:PostalCode>22222</a:PostalCode>

<a:Country>

<a:CountryCode>US</a:CountryCode>

</a:Country>

</Address>

</OrganizationEntity>

</FinancialRelationshipEntity>

<FinancialStake>

<!--This is an example where information is not gathered. The data model just tells the application that a stock exists. -->

<Stock financialInterestExists="true"/></FinancialStake>

</FinancialDisclosureInformation>

</IndividualFinancialInterestPackage>

</FinancialInterestPackages>

# References

**Address**  
ANSI /MEDBIQ PP.10.1-2008 Address Specifications and Description Document. MedBiquitous Website. <http://www.medbiq.org/working_groups/professional_profile/AddressSpecification.pdf> . Accessed June 24, 2015.

**Name**ANSI /MEDBIQ PP.10.1-2008 Name Specifications and Description Document. MedBiquitous Website. <http://www.medbiq.org/working_groups/professional_profile/NameSpecification.pdf> . Accessed June 24, 2015.

**Professional Profile**  
ANSI/MEDBIQ PP.10.1-2008, Healthcare Professional Profile. MedBiquitous Website. <http://www.medbiq.org/std_specs/standards/index.html#HCProfProfile> . Accessed June 24, 2015.