

School Information and Cover Page

School Name: Bronx Charter School for Excellence

School Leader: Charlene Reid, Head of School

School email address: [REDACTED]

Primary address: 1960 Benedict Avenue, Bronx, NY 10462

School website: www.bronxexcellence.org

School email: [REDACTED]

Telephone: 718-828-7301

Fax: 718-828-7302

BEDS # 321100860859

District/CSD of Location: 11

Charter authorizer: State University of New York, Charter Schools Institute

Chair, Board of Trustees: Joyce Frost

Date school first opened for instruction: 08/2004

2010-11 Enrollment: 382

2010-11 Grades Served: K-6

Our signatures below attest that all of the information contained herein is truthful and accurate.

Charlene Reid

Print Name, Head of Charter School

Signature and Date

[REDACTED] 7/27/11

Joyce Frost

Print Name, President, Board of Trustees

Signature and Date

[REDACTED] 7/26/11

Bronx Charter School for Excellence
Table of Contents

I. Charter Revisions

Appendices:

C. Financial Information

Total Expenditures and Administrative Expenses per Child

F. Board of Trustees –

Disclosure of Financial Interest Forms

I. - Charter School Revisions

During the 2010-2011 school year, material revisions to expand Bronx Charter School for Excellence's charter from K-5 to a K-8 was proposed by the school's Board of Trustees and approved by SUNY Charter Schools Institute.



Charter Schools Institute
The State University of New York

Annual Report Requirement
for SUNY Authorized Charter Schools

Bronx Charter School for Excellence

Administrative expenditures per pupil: **\$2,823.83**

Per NYS Statute

Administrative expenditures per pupil: the sum of all general administration salaries and other general administration expenditures divided by the total number of enrolled students. Employee benefit costs or expenditures should not be reported here.

**DISCLOSURE OF FINANCIAL INTEREST
BY A CHARTER SCHOOL TRUSTEE¹**

FOR INSTITUTE USE ONLY

FILING FOR SCHOOL YEAR:

DATE RECEIVED: _____

1. Name of charter school: Bronx Charter School for Excellence
2. Trustee's name (print): Andra B. Ehrenkranz
3. Position(s) on board (e.g., chair, treasurer, committee chair, etc.): member of Mktg. Comm.
4. Home address: [REDACTED] New York, NY 10021
5. Business Address: [REDACTED] New York, NY 10018
6. Daytime phone: [REDACTED]
7. E-mail: [REDACTED]
8. Is Trustee an employee of the school? ___ Yes. X No. If you checked yes, please provide a description of the position you hold, your salary and your start date.
9. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members have held or engaged in with the charter school during the prior school year. If there has been no such financial interest or transaction, please write "None." Please note that if you answered yes to Question 8, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of Financial Interest/Transaction	Steps Taken to Avoid a Conflict of Interest, (e.g., did not vote, did not participate in discussion)	Identity of Person Holding Interest or Engaging in Transaction (e.g., you and/or immediate family member (name))
None <i>Please write "None" if applicable. Do not leave this space blank.</i>	None	None	None

¹ Form Revised May 24, 2006

10. Identify each individual, business, corporation, union association, firm, partnership, committee proprietorship, franchise holding company, joint stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the charter school *and* in which such entity, during the preceding school year, you and/or your immediate family member(s) had a financial interest or other relationship. If you are a member, director, officer or employee of an organization formally partnered with the school that is doing business with the school through a management or services agreement, you need not list every transaction between such entity and the school that is pursuant to such agreement; rather, please identify only the name of the entity, your position in the entity as well as the relationship between such entity and the charter school. If there was no financial interest, please *write "None."*

Entity Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Holding an Interest in the Entity Conducting Business with the School and the Nature of the Interest	Steps Taken to Avoid Conflict of Interest
None <i>Please write "None" if applicable.</i>	None	None <i>Do not leave this space blank.</i>	None	None



 Sign

 July 10, 2011

 Date

**DISCLOSURE OF FINANCIAL INTEREST
BY A CHARTER SCHOOL TRUSTEE¹**

FOR INSTITUTE USE ONLY

FILING FOR SCHOOL YEAR: _____

DATE RECEIVED: _____

1. Name of charter school: Bloxix Charter School for Excellence
 2. Trustee's name (print): Deirdre Flynn
 3. Position(s) on board (e.g., chair, treasurer, committee chair, etc.): TREASURER
 4. Home address: [REDACTED] NYC 10024
 5. Business Address: _____
 6. Daytime phone: [REDACTED]
 7. E-mail: [REDACTED]
 8. Is Trustee an employee of the school? Yes. No. If you checked yes, please provide a description of the position you hold, your salary and your start date.
- _____
9. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members have held or engaged in with the charter school during the prior school year. If there has been no such financial interest or transaction, please write "None." Please note that if you answered yes to Question 8, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of Financial Interest/Transaction	Steps Taken to Avoid a Conflict of Interest, (e.g., did not vote, did not participate in discussion)	Identity of Person Holding Interest or Engaging in Transaction (e.g., you and/or immediate family member (name))
<p><i>Please write "None" if applicable. Do not leave this space blank.</i></p> <p style="text-align: center;"><i>[Handwritten Signature]</i></p>			

¹ Form Revised May 24, 2006

10. Identify each individual, business, corporation, union association, firm, partnership, committee proprietorship, franchise holding company, joint stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the charter school *and* in which such entity, during the preceding school year, you and/or your immediate family member(s) had a financial interest or other relationship. If you are a member, director, officer or employee of an organization formally partnered with the school that is doing business with the school through a management or services agreement, you need not list every transaction between such entity and the school that is pursuant to such agreement; rather, please identify only the name of the entity, your position in the entity as well as the relationship between such entity and the charter school. If there was no financial interest, please *write "None."*

Entity Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Holding an Interest in the Entity Conducting Business with the School and the Nature of the Interest	Steps Taken to Avoid Conflict of Interest
<i>Please write "None" if applicable. Do not leave this space blank.</i> None				

Signature

6/13/11
Date

**DISCLOSURE OF FINANCIAL INTEREST
BY A CHARTER SCHOOL TRUSTEE¹**

FOR INSTITUTE USE ONLY
FILING FOR SCHOOL YEAR: _____
DATE RECEIVED: _____

1. Name of charter school: Bronx Charter School for Excellence
2. Trustee's name (print): Joyce Frost
3. Position(s) on board (e.g., chair, treasurer, committee chair, etc.): Chair
4. Home address: [REDACTED] NY NY 10024
5. Business Address: [REDACTED] NY NY 10018
6. Daytime phone: [REDACTED]
7. E-mail: [REDACTED]
8. Is Trustee an employee of the school? Yes. No. If you checked yes, please provide a description of the position you hold, your salary and your start date.

9. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members have held or engaged in with the charter school during the prior school year. If there has been no such financial interest or transaction, please write "None." Please note that if you answered yes to Question 8, you need not disclose again your employment status, salary, etc.

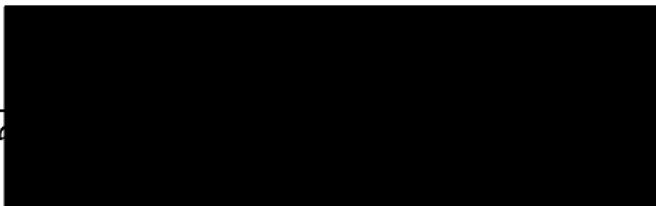
Date(s)	Nature of Financial Interest/Transaction	Steps Taken to Avoid a Conflict of Interest, (e.g., did not vote, did not participate in discussion)	Identity of Person Holding Interest or Engaging in Transaction (e.g., you and/or immediate family member (name))
<p>Please write "None" if applicable. Do not leave this space blank.</p> <p><i>None</i></p>			

¹ Form Revised May 24, 2006

10. Identify each individual, business, corporation, union association, firm, partnership, committee proprietorship, franchise holding company, joint stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the charter school *and* in which such entity, during the preceding school year, you and/or your immediate family member(s) had a financial interest or other relationship. If you are a member, director, officer or employee of an organization formally partnered with the school that is doing business with the school through a management or services agreement, you need not list every transaction between such entity and the school that is pursuant to such agreement; rather, please identify only the name of the entity, your position in the entity as well as the relationship between such entity and the charter school. If there was no financial interest, please *write "None."*

Entity Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Holding an Interest in the Entity Conducting Business with the School and the Nature of the Interest	Steps Taken to Avoid Conflict of Interest
<p><i>Please write "None" if applicable. Do not leave this space blank.</i></p> <p><i>None</i></p>				

Signature




Date

Appendix F: Disclosure of Financial Interest Form

Disclosure of Financial Interest by a New York Charter School Board of Trustees Member
Annual Report 2010-11

*Note: This Disclosure is a public record, but asterisked data fields will be redacted.

- 1. Trustee Name (print) KIM HARTMAN
- 2. Charter School Name BRONX CHARTER SCHOOL FOR EXCELLENCE
- 3. Charter Authorizer Entity _____
- 4. Home Address* _____
- 5. Business Address* _____
- 6. Daytime Phone* _____
- 7. E-Mail Address* 
- 8. List all positions held on board (e.g., chair, treasurer, parent representative)
Secretary

9. Is the trustee an employee of the school? ___ Yes No

If Yes, please provide a description of the position you hold and your responsibilities, your salary and your start date.

10. Is the trustee an employee or agent of the management company or institutional partner of the charter school? ___ Yes No

If Yes, please provide a description of the position you hold and your responsibilities, your salary and your start date.

10. Identify each individual, business, corporation, union association, firm, partnership, committee proprietorship, franchise holding company, joint stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the charter school and in which such entity, during the preceding school year, you and/or your immediate family member(s) had a financial interest or other relationship. If you are a member, director, officer or employee of an organization formally partnered with the school that is doing business with the school through a management or services agreement, you need not list every transaction between such entity and the school that is pursuant to such agreement; rather, please identify only the name of the entity, your position in the entity as well as the relationship between such entity and the charter school. If there was no financial interest, please write "None."

Entity Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Holding an Interest in the Entity Conducting Business with the School and the Nature of the Interest	Steps Taken to Avoid Conflict of Interest
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Please write "None" if applicable. Do not leave spaces b FIC.

NONE

Signature: 

Date: 06/27/11

FOR INSTITUTE USE ONLY

FILING FOR SCHOOL YEAR: _____

DATE RECEIVED: _____

**DISCLOSURE OF FINANCIAL INTEREST
BY A CHARTER SCHOOL TRUSTEE¹**

1. Name of charter school: Benny Carter School for Excellence
2. Trustee's name (print): Frank Trumbo
3. Position(s) on board (e.g., chair, treasurer, committee chair, etc.): Board Member
4. Home address: [REDACTED] New York New York 10019
5. Business Address: _____
6. Daytime phone: [REDACTED]
7. E-mail: [REDACTED]
8. Is Trustee an employee of the school? ___ Yes. No. If you checked yes, please provide a description of the position you hold, your salary and your start date.

9. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members have held or engaged in with the charter school during the prior school year. If there has been no such financial interest or transaction, please write "None." Please note that if you answered yes to Question 8, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of Financial Interest/Transaction	Steps Taken to Avoid a Conflict of Interest, (e.g., did not vote, did not participate in discussion)	Identity of Person Holding Interest or Engaging in Transaction (e.g., you and/or immediate family member (name))
<p style="text-align: center;"><i>Please write "None" if applicable. Do not leave this space blank.</i></p> <p style="text-align: center;"><i>None</i></p>			

¹ Form Revised May 24, 2006

**DISCLOSURE OF FINANCIAL INTEREST
BY A CHARTER SCHOOL TRUSTEE¹**

FOR INSTITUTE USE ONLY

FILING FOR SCHOOL YEAR: _____

DATE RECEIVED: _____

1. Name of charter school: Bronx Charter School for Excellence
2. Trustee's name (print): Kathleen Lathen
3. Position(s) on board (e.g., chair, treasurer, committee chair, etc.): Marketing/Development
4. Home address: [REDACTED]
5. Business Address: -
6. Daytime phone: [REDACTED]
7. E-mail: [REDACTED]
8. Is Trustee an employee of the school? Yes. No. If you checked yes, please provide a description of the position you hold, your salary and your start date.

9. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members have held or engaged in with the charter school during the prior school year. If there has been no such financial interest or transaction, please write "None." Please note that if you answered yes to Question 8, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of Financial Interest/Transaction	Steps Taken to Avoid a Conflict of Interest, (e.g., did not vote, did not participate in discussion)	Identity of Person Holding Interest or Engaging in Transaction (e.g., you and/or immediate family member (name))
<p>Please write "None" if applicable. Do not leave this space blank.</p> <p style="text-align: center; font-size: 2em;"><i>NONE</i></p>			

¹ Form Revised May 24, 2006

BCE

FOR INSTITUTE USE ONLY
FILING FOR SCHOOL YEAR: _____
DATE RECEIVED: _____

**DISCLOSURE OF FINANCIAL INTEREST
BY A CHARTER SCHOOL TRUSTEE¹**

- Name of charter school: BRONX CHARTER SCHOOL OF EXCELLENCE
- Trustee's name (print): STACEY LAUREN
- Position(s) on board (e.g., chair, treasurer, committee chair, etc.): VICE CHAIR
- Home address: [REDACTED] NEW YORK, NEW YORK 10025
- Business Address: _____
- Daytime phone: [REDACTED]
- E-mail: [REDACTED]
- Is Trustee an employee of the school? Yes. No. If you checked yes, please provide a description of the position you hold, your salary and your start date.

9. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members have held or engaged in with the charter school during the prior school year. If there has been no such financial interest or transaction, please write "None." Please note that if you answered yes to Question 8, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of Financial Interest/Transaction	Steps Taken to Avoid a Conflict of Interest, (e.g., did not vote, did not participate in discussion)	Identity of Person Holding Interest or Engaging in Transaction (e.g., you and/or immediate family member (name))
Please write "None" None if applicable. Do not leave this space blank.			

¹ Form Revised May 24, 2006

**DISCLOSURE OF FINANCIAL INTEREST
BY A CHARTER SCHOOL TRUSTEE¹**

FOR INSTITUTE USE ONLY
 FILING FOR SCHOOL YEAR: _____
 DATE RECEIVED: _____

1. Name of charter school: Bronx Charter School For Excellence
2. Trustee's name (print): Robert Lester
3. Position(s) on board (e.g., chair, treasurer, committee chair, etc.): member
4. Home address: [REDACTED] NY, NY 10007
5. Business Address: [REDACTED] NY NY 10154
6. Daytime phone: [REDACTED]
7. E-mail: [REDACTED]
8. Is Trustee an employee of the school? ___ Yes. No. If you checked yes, please provide a description of the position you hold, your salary and your start date.

9. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members have held or engaged in with the charter school during the prior school year. If there has been no such financial interest or transaction, please write "None." Please note that if you answered yes to Question 8, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of Financial Interest/Transaction	Steps Taken to Avoid a Conflict of Interest, (e.g., did not vote, did not participate in discussion)	Identity of Person Holding Interest or Engaging in Transaction (e.g., you and/or immediate family member (name))
<p>Please write "None" if applicable. Do not leave this space blank.</p> <p><i>None</i></p>			

¹ Form Revised May 24, 2006

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Entity Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Holding an Interest in the Entity Conducting Business with the School and the Nature of the Interest	Steps Taken to Avoid Conflict of Interest
<p>Please write "None" if applicable. Do not leave this space blank.</p>				

Sig



Date

7/18/11

**DISCLOSURE OF FINANCIAL INTEREST
BY A CHARTER SCHOOL TRUSTEE¹**

<p>FOR INSTITUTE USE ONLY</p> <p>FILING FOR SCHOOL YEAR: _____</p> <p>DATE RECEIVED: _____</p>

- Name of charter school: BCSE Bronx Charter School of Excellence
- Trustee's name (print): Rosemary C. Milliman Ph.D.
- Position(s) on board (e.g., chair, treasurer, committee chair, etc.): Education Committee
- Home address: [REDACTED] North Bergen NJ 07047
- Business Address: [REDACTED] New York NY 10024
- Daytime phone: [REDACTED]
- E-mail: [REDACTED]
- Is Trustee an employee of the school? ___Yes. XNo. If you checked yes, please provide a description of the position you hold, your salary and your start date.

- Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members have held or engaged in with the charter school during the prior school year. If there has been no such financial interest or transaction, please *write "None."* Please note that if you answered yes to Question 8, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of Financial Interest/Transaction	Steps Taken to Avoid a Conflict of Interest, (e.g., did not vote, did not participate in discussion)	Identity of Person Holding Interest or Engaging in Transaction (e.g., you and/or immediate family member (name))
None..... <i>Please write "None" if applicable. Do not leave this space blank.</i>	None	None	none

¹ Form Revised May 24, 2006

10. Identify each individual, business, corporation, union association, firm, partnership, committee proprietorship, franchise holding company, joint stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the charter school *and* in which such entity, during the preceding school year, you and/or your immediate family member(s) had a financial interest or other relationship. If you are a member, director, officer or employee of an organization formally partnered with the school that is doing business with the school through a management or services agreement, you need not list every transaction between such entity and the school that is pursuant to such agreement; rather, please identify only the name of the entity, your position in the entity as well as the relationship between such entity and the charter school. If there was no financial interest, please *write "None."*

Entity Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Holding an Interest in the Entity Conducting Business with the School and the Nature of the Interest	Steps Taken to Avoid Conflict of Interest
none	none	none	none	none
<i>Please write "None" if applicable. Do not leave this space blank.</i>				



July 28, 2011

Signature

Date

**DISCLOSURE OF FINANCIAL INTEREST
BY A CHARTER SCHOOL TRUSTEE¹**

FOR INSTITUTE USE ONLY

FILING FOR SCHOOL YEAR:

DATE RECEIVED: _____

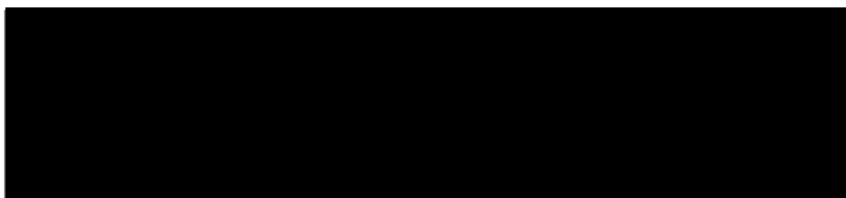
1. Name of charter school: Bronx Charter School for Excellence
2. Trustee's name (print): Dr. Christopher A. Schoberl
3. Position(s) on board (e.g., chair, treasurer, committee chair, etc.): Education Committee member
4. Home address: [REDACTED] NYC, NY 10027
5. Business Address: [REDACTED] NYC, NY 10024
6. Daytime phone: [REDACTED]
7. E-mail: [REDACTED]
8. Is Trustee an employee of the school? ___ Yes. No. If you checked yes, please provide a description of the position you hold, your salary and your start date.
9. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members have held or engaged in with the charter school during the prior school year. If there has been no such financial interest or transaction, please *write "None."* Please note that if you answered yes to Question 8, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of Financial Interest/Transaction	Steps Taken to Avoid a Conflict of Interest, (e.g., did not vote, did not participate in discussion)	Identity of Person Holding Interest or Engaging in Transaction (e.g., you and/or immediate family member (name))
NONE	NONE	NONE	NONE
<i>Please write "None" if applicable. Do not leave this space blank.</i>			

¹ Form Revised May 24, 2006

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Entity Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Holding an Interest in the Entity Conducting Business with the School and the Nature of the Interest	Steps Taken to Avoid Conflict of Interest
NONE	NONE	NONE	NONE	NONE
<i>Please write "None" if applicable. Do not leave this space blank.</i>				



Signature

Date 7/20/11

**DISCLOSURE OF FINANCIAL INTEREST
BY A CHARTER SCHOOL TRUSTEE¹**



FOR INSTITUTE USE ONLY
 FILING FOR SCHOOL YEAR: _____
 DATE RECEIVED: _____

1. Name of charter school: Bronx Charter School For Excellence
2. Trustee's name (print): Stanley Seidman
3. Position(s) on board (e.g., chair, treasurer, committee chair, etc.): Member of Education Committee
4. Home address: [Redacted] NYC, NY 10022
5. Business Address: [Redacted]
6. Daytime phone: [Redacted]
7. E-mail: [Redacted]
8. Is Trustee an employee of the school? ___ Yes. No. If you checked yes, please provide a description of the position you hold, your salary and your start date.

9. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members have held or engaged in with the charter school during the prior school year. If there has been no such financial interest or transaction, please write "None." Please note that if you answered yes to Question 8, you need not disclose again your employment status, salary, etc.

Date(s)	Nature of Financial Interest/Transaction	Steps Taken to Avoid a Conflict of Interest, (e.g., did not vote, did not participate in discussion)	Identity of Person Holding Interest or Engaging in Transaction (e.g., you and/or immediate family member (name))
Please write "None" if applicable. Do not leave this space blank. <u>None</u>			

¹ Form Revised May 24, 2006

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Entity Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Holding an Interest in the Entity Conducting Business with the School and the Nature of the Interest	Steps Taken to Avoid Conflict of Interest
<p><i>None</i></p> <p><i>Please write "None" if applicable. Do not leave this space blank.</i></p>				

Signature _____

Date 7/16/11

**DISCLOSURE OF FINANCIAL INTEREST
BY A CHARTER SCHOOL TRUSTEE¹**

FOR INSTITUTE USE ONLY
 FILING FOR SCHOOL YEAR: _____
 DATE RECEIVED: _____

- 1. Name of charter school: Bronx Charter School for Excellence
- 2. Trustee's name (print): MICHAEL STERN
- 3. Position(s) on board (e.g., chair, treasurer, committee chair, etc.): VICE CHAIR BOARD MEMBER
- 4. Home address: [REDACTED] NYC 10022
- 5. Business Address: [REDACTED]
- 6. Daytime phone: [REDACTED]
- 7. E-mail: [REDACTED]
- 8. Is Trustee an employee of the school? Yes. No. If you checked yes, please provide a description of the position you hold, your salary and your start date.

9. Identify each interest/transaction (and provide the requested information) that you or any of your immediate family members have held or engaged in with the charter school during the prior school year. If there has been no such financial interest or transaction, please write "None." Please note that if you answered yes to Question 8, you need not disclose again your employment status, salary, etc.

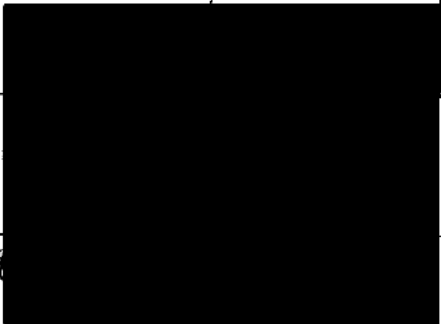
Date(s)	Nature of Financial Interest/Transaction	Steps Taken to Avoid a Conflict of Interest, (e.g., did not vote, did not participate in discussion)	Identity of Person Holding Interest or Engaging in Transaction (e.g., you and/or immediate family member (name))
<p><i>Please write "None" if applicable. Do not leave this space blank.</i></p>			

¹ Form Revised May 24, 2006

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Entity Conducting Business with the School	Nature of Business Conducted	Approximate Value of the Business Conducted	Name of Trustee and/or Immediate Family Holding an Interest in the Entity Conducting Business with the School and the Nature of the Interest	Steps Taken to Avoid Conflict of Interest
<p><i>Please write "None" if applicable. Do not leave this space blank.</i></p>				

Signature



Date

6/13/11