

# ATTACHMENT D to Evaluation Advisory Group Charter

## Conflict of Interest Disclosure Form

**Note:** This COI Disclosure Form is included here for reference. It will be provided to Evaluation Advisory Group members for completion and signature in an electronic form.

Members must complete this form and return it to CalMTA to be posted on its website:

- Prior to joining the Evaluation Advisory Group, annually and upon the conclusion of the member's service,
- When a member becomes aware of an actual or potential conflict of interest or the appearance of an actual or potential conflict of interest related to an Evaluation Advisory Group topic that has not been previously reported per item (a) above.

1. Name and Title:

Alex Dunn

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Director

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2. Email Address:

alex@illumeadvising.com

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3. Employer:

ILLUME Advising

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4. Do you, your immediate family member, your employer, or a parent, affiliate, or subsidiary of your employer currently provide services to CalMTA?

Yes      No

If yes, please describe.



5. Do you, your immediate family member, your employer, or a parent, affiliate, or subsidiary of your employer currently have, or are planning to have, a financial relationship with Resource Innovations, Cadmus, 2050 Partners, Brio, Unrooz Solutions, or Ortiz Group?

Yes      No

If yes, please describe the nature and duration of those financial relationships.

6. Are you aware of other circumstances that could be an actual or perceived conflict of interest?

Yes      No

If yes, please describe.

I attest that the above material is accurate. If I discover that I might have a perceived or actual conflict in addition to those listed above, I will immediately inform the appropriate individuals.

Name: Alex Dunn

Signed by:  Date: 11/22/2024  
Signature: 3DE6F7E62E2E429...

