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| Financial Information Distribution to External Third Parties | Policy Approved By: Board of Directors  |
| Section:  Finance Policies | Date of Approval: Month XX, 2019 |
| Accreditation Issue:  | Date of Next Review: Month XX, 2022 |

#### 1.0 Introduction

From time to time the Health Centre will be requested to supply financial information to third parties. Without restricting the generality of the foregoing, such a request may help ensure compliance with a license that the Health Centre is a party to, or may be needed to satisfy the terms of a funding application. In all instances, and regardless of the form it takes, the Executive Director must first approve of the distribution of financial information before it is released. Quest will ensure that there is adequate segregation of responsibilities for roles involving financial transactions. For transactions or roles that do not have a segregation of duty, adequate compensating controls will be put in place and documented.

#### Scope

Executive Director, Management Team and Financial Staff.

#### 3.0 Policy/Procedure

If a Third Party requires such financial information, the employee shall complete a Request for Information form. The purpose and the intended use of the requested material, and the source of the request, shall be made clear on the form.

If required in a form other than the Audited Financial Statements, the Executive Director/Finance Consultant shall prepare the financial information in the format required and submit it to the Executive Officer (as appropriate) for review and approval (a) The information should be clearly marked audited or unaudited, as appropriate. (b) The following statement should accompany un-audited information: “The Health Centre will not be held responsible by any third party who relies on information contained in un-audited statements” The Executive Director shall authorize distribution of the information by initialing the Health Centre’s Request for Information Form.

#### 4.0 RELATED QUEST FINANCE POLICIES

N/A

#### 5.0 RELATED QUEST FORMS

Request for Information Form (link)

#### 6.0 Other References and Additional Information

N/A

#### 7.0 Policy Contact

Executive Director