Marketing Compliance & Claims Audit Worksheet

Practitioner Name: __ *Content/Platform:* __ **Date:** ___

Use this worksheet before publishing any social media post, website copy, or email blast to ensure your marketing aligns with FTC and FDA regulations for Functional Medicine practitioners.

Section 1: The "Support" Shift (Language Audit)

Review your draft. If you find any "Disease Claims" (left column), you must rewrite them as "Structure/Function Claims" (right column).

Prohibited "Disease" Language	Compliant "Structure/Function" Language	Check if Used
Cure, Treat, Heal, Reverse	Support, Maintain, Promote, Optimize	☐
[Disease Name] (e.g., Diabetes, PCOS)	[Body System] (e.g., Blood sugar, Hormones)	☐
Anti-inflammatory (on supplements)	Supports healthy inflammatory response	☐
Medical/Clinical Diagnosis	Wellness, Vitality, Balance	☐

Draft Revision: *Original Phrase:* _____ *Compliant Phrase:* _____

Section 2: Testimonial & Disclosure Checklist

If your content includes a client success story or a product recommendation, complete this section.

- [ ] **Representative Results:** If the client had a "miracle" result, have I included a disclaimer stating "Results not typical" and provided the average expected outcome?

- [ ] **Material Connection:** If I am an affiliate for a product mentioned, is #ad or an affiliate disclosure clearly visible *before* the "see more" link?

- [ ] **Authenticity:** Is this a 100% genuine review from a real client? (No paid or fabricated reviews).

- [ ] **No Disease Claims in Quotes:** Did I edit or add a disclaimer to the client's quote if they used words like "cured my [disease]"?

Section 3: Substantiation & FDA Requirements

For every specific health claim made in your "Target" phase protocols, ensure you have the following:

Claim Being Made	Scientific Evidence (Study Name/Link)	FDA Disclaimer Included?
Ex: Magnesium improves sleep	Meta-analysis: [Journal Name, Year]	[X]
		☐
		☐

Section 4: Risk Rating & Reflection

Total Compliance Score: 1. Does the content guarantee a specific health outcome? (Yes = High Risk | No = Low Risk) [ ] 2. Does the content mention a specific disease by name? (Yes = High Risk | No = Low Risk) [ ] 3. Is the mandatory FDA Disclaimer Box present on the page/label? (Yes = Low Risk | No = High Risk) [ ]

Observations/Necessary Edits:

Next Steps:

- [ ] Move research links to the "Digital Substantiation Folder."
- [ ] Update private-label supplement labels if "Adrenal Fatigue" or "Inflammation" is mentioned.
- [ ] Final Approval: Content is ready for publication.

AccrediPro Standards Institute Certified Tool