

MEDIFAST® | Trilivy™

Medifast® is the health and wellness company behind Trilivy™. Trilivy's comprehensive metabolic health system combines science-backed plans and products, personalized coaching and healthy habit creation to reverse metabolic dysfunction. As such, we are committed to supporting ethical, independent research conducted by qualified investigators that aligns with our mission and vision.

Investigator Initiated Studies (IIS) are clinical studies initiated and managed by outside investigators, generally from academic institutions, medical research centers, and/or other collaborative groups. These external researchers assume full responsibility for the legal, regulatory, and ethical conduct of the trial, in accordance with all applicable laws and regulations and as outlined in the 9 *Guiding Principles for Industry Funding of Food and Nutrition Research*.[1]

Medifast may support IIS research in a variety of ways (outlined below), contingent on the proposed study's scientific merit and strategic fit with the Company's defined priority areas of interest.

CONTACT INFORMATION

Interested parties should submit their Letter of Intention (see **Full Application Packet Instructions**) and any questions about the application process to: **Jessica.Kiel@medifastinc.com**.

Medifast's Investigator Initiated Studies (IIS) Research Collaborations

Funding Opportunities May Be One or a Combination of the Following

- Up to 5 competitive grants per year (typically up to $25,000 each; higher amounts may be considered on a case-by-case basis).
- In-kind product donation: Provision of commercially-available Trilivy™ products for study participants' use within one of Trilivy's standardized meal plans or programs.

Key Funding Priority Areas

- Medifast prioritizes clinical, real-world evidence, and proof-of-principle studies that utilize a standardized Trilivy meal plan and/or program and focus on one or more of the following domains:
  - Weight loss and/or weight loss maintenance
  - Areas of metabolic and cardiometabolic health: cellular energetics, mitochondrial function and efficiency, metabolic flexibility, effects on glycemic control (glucose uptake, insulin sensitivity, prediabetes, type 2 diabetes, etc.), and body composition, among others.
  - Gut-muscle axis, digestive and absorptive capacity, nutrient utilization
  - Obesity pharmacotherapy: GLP-1 receptor agonists, incretin-based therapies, etc.
  - Digital technology: applications and/or platforms focused on lifestyle and behavior change
  - Biobehavioral aspects: habit installation and habit strength, especially as related to physical activity, sleep and other behaviors associated with optimizing cardiometabolic health, weight management and/or weight maintenance
  - Muscle health span, exercise with or without essential amino acids and/or the use of a structured Trilivy meal plan for optimizing cardiometabolic health, weight loss or maintenance

Lower Priority Studies

- Animal studies or other pre-clinical models without a clear and direct human translation plan.

Investigator Qualifications & Required Documents

All of the following documents are required as a part of the initial submission process (additional materials and a proposed budget will be required if the application moves past the initial review stage):

- A Letter of Intention (LOI) of a maximum of 2 pages outlining the study concept proposal.
  - Should include background, research question and hypothesis, study design, target population and sample size, trial duration, number and location of sites, key eligibility criteria, treatment plan, primary and secondary endpoints, preliminary budget, brief timeline and planned statistical approach.
- Up-to-date curriculum vitae of the investigator to ensure he/her is fully qualified to conduct the proposed study.

Application, Submission, & Review Process

After the initial Letter of Intention submission, the following will occur:

- Cross-functional review of the LOI based on methodological rigor, scientific merit and alignment with the Company's priority research areas.
- If the Company is interested in the study concept, the researcher will be contacted and invited to provide additional details, including a detailed budget and a complete written protocol.
- Researchers may be asked to answer additional questions before being informed of Medifast's decision as to whether there is interest to move forward with the proposed study.

1.Larrick BM, Dwyer JT, Erdman JW, D'Aloisio RF, Jones W. An updated framework for industry funding of food and nutrition research: Managing financial conflicts and scientific integrity. J Nutr. 2022. doi: 10.1093/jn/nxac106.

Research Requirements

IIS researchers will be required to meet certain minimum study status and reporting requirements as outlined in the 9 *Guiding Principles for Industry Funding of Food and Nutrition Research* and beyond,[1] including but not limited to:

- Verification all applicable regulatory requirements have been met.
- Registration of study protocol on **www.ClinicalTrials.gov** or other applicable public database of research trials.
- At least quarterly updates on the status of the study as stipulated in the IIS Research Agreement.
- Reporting of safety data to all relevant authorities; as per IIS Research Agreement, all adverse events, serious adverse events, and adverse event reconciliation should be reported to Medifast.
- Amendments and IRB submissions related to the protocol or informed consent should be immediately reported.
- Failure to provide regular study updates, comply with the terms and conditions of the IIS Research Agreement, or meet enrollment expectations may result in an internal review from which funding and/or product may be withheld, and the study agreement may be terminated.
- Funding/product support and all relevant conflicts must be acknowledged in publications/presentations.
- Investigators are encouraged to prepare abstracts and manuscripts for submission to peer-reviewed, reputable places of publication. All planned abstracts/manuscripts must be sent to Medifast prior to submission, as stipulated in the IIS Research Agreement.
- A final written study report is expected.

Funding & Product Provision Requirements

Funding and product provision are contingent on execution of the required agreements and ongoing compliance with regulatory and reporting requirements. Key requirements include:

- Review and approval of the study proposal by Medifast Scientific & Clinical Affairs team.
- Fully executed Non-Disclosure Agreement and IIS Research Agreement.
- Proof of completion of all applicable regulatory requirements (ethics board approval, protocol registration, etc.).
- Provision of all required documentation for the Master Data File, as stipulated in the IIS Research Agreement.
- If funding is provided, it will only be released as key milestones are achieved (in accordance with the payment schedule noted in the IIS Research Agreement). Examples include, but are not limited to:

Execution of NDA, IIS Research Agreement, Ethics Review Board approval, and First Participant, First Visit	10%
Provision of study report to Medifast upon completion of the study	10%
Submission for publication/presentation or provision of publication/presentation to Medifast	10%
Other milestones based on the project defined within the Research Agreement	Varies

Medifast's Commitment to Transparency & Ethical Considerations

Transparency is a central aspect of trust. As such, Medifast is committed to engaging in and supporting research that embodies the core principles of credibility, transparency and ethical conduct.

Medifast's IIS Research Priority Areas

Primary Focus & Priority Areas

Healthy Weight Management

- Weight loss using a structured weight loss meal plan
  - Reset 5 & 1 Plan
  - Reset 5 & 1 Active Plan
  - Reset 4 & 2 Active Plan
  - 5 & 2 & 2 Plan
- Overweight and obese populations
  - Metabolic health
  - Glycemic control (Diabetes, Pre-diabetes)
- Obesity pharmacotherapy

Healthy Eating and Hydration

- Cardiometabolic health outcomes
- Weight loss maintenance and weight management
  - Weight maintenance with the Refine Optimization Plan
  - Intermittent fasting
- Dietary supplement use (e.g., Essential Amino Acids, etc.)
- Habit installation and strength

Healthy Motion

- Muscle health
  - Body composition
  - Physical function, mobility
- Exercise
  - With or without use of Trilivy Essential Amino Acids, and/or Whey Protein
  - Exercise performance
  - Recovery
  - Resistance training and weight-bearing loads

Secondary Focus & Priority Areas

Healthy Sleep and Energy Management

- Sleep
  - Circadian rhythm
- Factors associated with energy management, metabolic health

Healthy Mind

- Mental health/wellbeing
  - Emotional wellbeing
  - Stress management
- Brain health
  - Cognitive Performance Brain health
- Quality of life
- Behavioral health interventions

Healthy Surroundings

- Support systems
  - Role/effect during weight loss and/or maintenance
  - Role/effect on behavior change
- Digital tracking
- Choice architecture and stimulus control