



NATIONAL ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS

Code of Ethics

PREAMBLE: Helping my clients protect their assets and establish financial security, independence and economic freedom for themselves and those they care about is a noble endeavor and deserves my promise to support high standards of integrity, trust and professionalism throughout my career as an insurance and financial professional. With these principles as a foundation, I freely accept the following obligations:

- To help maintain my clients' confidences and protect their right to privacy.
- To work diligently to satisfy the needs of my clients by acting in their best interest.
- To present, accurately and honestly, all facts essential to my clients' financial decisions.
- To render timely and proper service to my clients and ultimately their beneficiaries.
- To continually enhance professionalism by developing my skills and increasing my knowledge through education.
- To obey the letter and spirit of all laws and regulations which govern my profession.
- To conduct all business dealings in a manner which would reflect favorably on NAIFA and my profession.
- To cooperate with others whose services best promote the interests of my clients.
- To protect the financial interests of my clients, their financial products and my profession, through political advocacy.

Adopted July 2019, Board of Trustees

To **Join** NAIFA,
or to **Renew** your NAIFA Membership,
visit the **NAIFA National website** at
naifa.org

MEMBERSHIP
is the Best Value

JOIN NAIFA

***** Producers *****

Monthly or annual fees based on the number of years licensed. Choose monthly or annual plan during the sign-up process.

\$10/month Licensed For One Year	\$20/month Licensed For Two Years
\$30/month Licensed For Three Years	\$40/month Licensed For Four Years
\$68/month Licensed For Five Years+	

+ \$1 processing fee per month

***** Associate Members *****

Associate members receive many of the same benefits of membership, but are limited in the ability to hold certain leadership roles.

Industry Professional \$500/Year	Administrative Professional \$20/Month Or \$240/Year
Student \$50/Year	

The Many Valued Benefits of Being a NAIFA Member



Advocate. Educate. **Differentiate.**

NAIFA's Membership Promise

NAIFA-Indiana

1717 E. 116th Street, Suite 104, Carmel, IN 46032

Contact us:

Phone: 317-844-6268

E-mail:

sandyg2012@naifa-indiana.org

For more information:

State website: naifa-indiana.org

National website: naifa.org



Advocate.

The protective advisor

NAIFA participates in a number of coalitions to advance our advocacy goals.

Among them are:

- Save Our Savings
- Partnership to Protect Workplace Opportunity (PPWO)
- Coalition for Medicare Choices (CMC)
- Partnership to Protect Medicaid
- Choose to Save
- State Tax Challenges Coalition
- National Coalition on Benefits (NCB)
- Retirement Savings Network (RSN)
- Joint Trades Group
- Health Insurance Agent & Broker Alliance
- American Savings Education Council (ASEC)
- ABLE Alliance for Financial Empowerment: Promoting financial independence for people with disabilities
- Partnership for America's Health Care Future

Related benefits for members include:

<u>Benefit</u>	<u>Value</u>
** Indiana State Day on the Hill with Legislators	Priceless
- Opportunities to meet State and Federal Legislators	''
* NAIFA National Congressional Congress in Washington, D.C.	''
- NAIFA has the largest Insurance Political Action Committee (PAC) in the country	''

Educate.

The thinking advisor

Membership to NAIFA attracts top performers who are civic-minded. This hard-working group of people focus on the process of continually building their business, increasing knowledge & enhancing skills. NAIFA's educational offerings provide members with the professional development and continuing education needed to be a top producer. Additionally, NAIFA offers more than 50 professional programs and products to enhance skills and provide value-added business services. CE needed to perform and grow a business is regularly offered. The increasing number of Webinars being available are facilitating bringing members the best speakers in the industry, regardless of the member's location. NAIFA recognizes that Knowledge is Power, and strives to provide this important benefit.

Related benefits for members include:

<u>Benefit</u>	<u>Value</u>
** 4-6 face-to-face CE meetings	\$360
** 3 hour Ethics Course	\$45
** 4 hour Annuity Course	\$60
** 5 Hour Re-Certification for LTC	\$75
** 12 CE Broadcasts	\$180

All above benefits are FREE to members

Designation Classes (LUTC, LACP, FSCP, etc.)

** For more info go to naifa-indiana.org

* For more info go to naifa.org

Differentiate.

The trusted advisor

NAIFA members are our most valuable assets. The collective sum of the individual differences, life experiences, knowledge, inventiveness, innovation, self-expression, unique capabilities and talent that our members possess and invest in their work represents a significant part of not only NAIFA's culture, but our reputation as an organization.

NAIFA embraces and encourages our members' differences in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socio economic status and other characteristics that make our members unique.

Related benefits for members include:

<u>Benefit</u>	<u>Value</u>
- Relationship Opportunities	Inestimable
- Idea Sharing	
- Exposure to experts	
* Resource Library (electronic/print)	Invaluable
- Credibility - Mainstream	Professional Benefit/ Professional Esteem
* Leadership Development/ Leadership In Life Institute (LILI)	
* Discounts (E&O, Supplement Mtgs. Etc.)	Discount may be enough to pay NAIFA yearly dues
* Marketing Program	