

FINANCIAL PLANNING DAY \$

Volunteer Code of Conduct

I agree that after my volunteer application has been accepted, I will complete the Financial Planning Day Volunteer Boot Camp designed to train and prepare me for my participating in the Financial Planning Day.

When advising Financial Planning Day attendees, I agree to abide by my professional organization's Code of Ethics, requiring me to place my clients' interests first. Further, I agree to provide Financial Planning Day attendees the same quality of services as I would a paying client.

I agree not to sell or promote any products or services to Financial Planning Day attendees, give out business cards or marketing materials to attendees, take names, or follow up with attendees after the event. Further, I agree that no client relationship may be formed at the event. If an attendee wishes to contact me using my listing in the event handout and continue working with me post-event, I agree that such an arrangement is permitted solely at the initiative of the attendee.

I agree to comply with federal and state privacy laws to ensure that attendee information will be kept confidential, similar to the treatment of regular client information.

Financial Planning Day national organizers may provide various materials and documents to volunteers to maximize the effectiveness of one-on-one counseling and educational workshops. I agree to use all such materials only for the purposes of the Financial Planning Day.