



MDRT Global Services

Code Of Ethics

Building Leaders to Build Success

Members of MDRT Global Services should be ever mindful that complete compliance with and observance of the Code of Ethics of MDRT Global Services shall serve to promote the highest quality standards of membership. These standards will be beneficial to the public and the financial services profession, and its related financial products.

01 Always place the best interest of their advisors and clients above their own direct and indirect interests.

02 Maintain the highest standards of professional competence by seeking to maintain and improve professional knowledge, skills and expertise.

03 Hold in the strictest confidence, and consider as privileged, all business and personal information pertaining to their advisors' and clients' affairs.

04 Make full and adequate disclosures of all facts necessary to enable their advisors and clients to make informed decisions.

05 Maintain personal conduct that will reflect favorably on the insurance and financial services profession and MDRT Global Services.

06 Determine that any replacement of an insurance or financial product must be beneficial for the client.

07 Abide by and conform to all the provisions of the laws and regulations in the jurisdictions in which they do business.

08 Refrain from recruiting or attempted recruiting of personnel or advisors of one company or firm by persons of another company or firm.