

Business Etiquette

Conduct Guidelines

- Working in the office
- Interacting with team members
- Attending internal meetings
- Interacting and meeting with prospects and clients
- Interacting with carriers
- Attending networking events
- Using social media
- Responding to texts and email
- Handling conflicts and complaints

Producer Ethics

State and Federal Regulations:

- Licensing
- Fair Trade
- Fair Credit Reporting
- Product Regulation
- Market Regulation

Ethical Issues

- Disclosure
- Confidentiality
- Compliance
- Misrepresentation
- Fraud
- Altering applications
- Rebating
- Discuss any other ethical issues.