**SAN FRANCISCO MEMBER GUIDELINES**

These Guidelines for Member Conduct (Guidelines) identify certain ethical standards by which all members of the WP&BC should abide.

**1. Use of WP&BC Member Data**

The WP&BC maintains membership data (or records) in a variety of ways, including hardcopy rosters and databases including an Online Roster. Membership data includes telephone numbers, e-mail addresses, and physical mailing addresses.  
  
A WP&BC member may use WP&BC Member data to obtain contact information for other members, provided that the member has a specific purpose for contacting the other member, and that the member reasonably believes that the other member will welcome the contact. A WP&BC member shall not use WP&BC Member data to conduct broad-based solicitations for services, product sales, advertisements, employment opportunities, or any other purpose.  
  
Additionally, a WP&BC member shall not publish contact information from WP&BC Member data, or otherwise disseminate Member data to any individual or organization that is not a member of WP&BC. A member who violates this guideline shall be subject to disciplinary procedures, which may include expulsion from the WP&BC.  
  
**2. Compliance**

A WP&BC member should be knowledgeable about these Guidelines, keep current with Guideline revisions and abide by their provisions.  
  
Laws and regulations may impose binding obligations on a benefits professional. Where the requirements of law or regulation conflict with these Guidelines, the requirements of law or regulation take precedence.  
  
A WP&BC member should not knowingly participate or assist in any violation of the Guidelines or applicable laws and regulations.  
  
**3. Prohibition Against Plagiarism**

A WP&BC member should not copy or use, in substantially the same form as the original, material prepared by another without acknowledging and identifying the name of the author, publisher, or source of such material. Members may use, without acknowledgment, factual information published by recognized financial, tax and statistical reporting services or similar sources.  
 **4. Obligations with Respect to Possible Violations of Guidelines**

In order to facilitate the administration of these guidelines, a member should respond promptly in writing to any letter received from a person duly authorized by WP&BC to obtain information or assistance regarding possible violations of these Guidelines.

Adopted June 2, 2005