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ETHICS

INTRODUCTION: This presentation covers various claim situations and how to keep our ethics when dealing with difficult situations and transactions.

Introduction

- What triggers a claim

Claim Situation #1 (access)

- Nature of the claim
- What was done right and wrong
- What were the ethical challenges presented
- How to balance client relationship and our ethics

Claims Situation #2 (Proceed distribution)

Nature of the claim

- What was done right and wrong

- What were the ethical challenges presented
- How to balance client relationship and our ethics

Claims Situation #3 (Power of attorney)

- Nature of the claim
- What was done right and wrong
- What were the ethical challenges presented
- How to balance client relationship and our ethics

Group Discussion-you be the underwriter

- Fact pattern
- Assessment-ethics dilemmas presented
- Resolution

Question and Answer