



Insured Retirement Institute

IRI Virtual Meeting Code of Conduct

This Virtual Meeting Code of Conduct applies to all IRI meeting-related events, including those sponsored by organizations other than IRI but held in conjunction with IRI events, on public or private platforms. All participants, including but not limited to attendees, speakers, volunteers, exhibitors, IRI staff members, service providers, vendors, contractors, and all others are expected to abide by this Virtual Meeting Code of Conduct and comply with the instructions of session moderators and IRI staff.

IRI is committed to providing a professional, collegial, safe, supportive, respectful, productive, and welcoming virtual meeting environment for all meeting participants and IRI staff, regardless of a person's race, color, ethnicity, national origin, citizenship status, age, religion, disability status, gender, gender identity, sexual orientation, genetic information, physical appearance, body size, or other characteristic ("personal characteristics").

IRI expects individuals to uphold the professional and educational purposes of IRI and its events by respecting the rights, privacy, safety, and dignity of all persons. IRI has zero-tolerance for any form of discrimination or harassment, including but not limited to sexual harassment by participants or our staff at our meetings.

IRI reserves the right to take any action deemed necessary and appropriate, including immediate removal of any individual from the meeting without warning or refund, in response to any incident of unacceptable behavior, and IRI reserves the right to prohibit attendance by any individual at any future meeting, virtually or in person.

If you experience, witness, or hear of any incidents of unacceptable behavior, or if you believe there has been a violation of this Policy, IRI asks that you inform either Jason Berkowitz, Chief Legal & Regulatory Affairs Officer, jberkowitz@irionline.org or 202-469-3014, or Jane Forsythe, Chief Membership Officer, jforsythe@irionline.org or 202-469-3016 so that we can take appropriate action. Reports may be anonymous or attributed. IRI will use its best efforts to promptly respond to all attributed reports.

Unacceptable Behavior includes, but is not limited to, the following:

- Harassment, intimidation, discrimination, or verbal or written abuse of any attendee, speaker, volunteer, exhibitor, IRI staff member, service provider, or other meeting guest in any form, including but not limited to:
 - Unwelcome and uninvited attention or contact with another participant

- Verbal or written comments, or visual images, that are sexually suggestive, or that denigrate or show hostility or aversion toward an individual, or group of individuals, or that create an intimidating, hostile, or offensive environment, or that unreasonably interfere with an individual's ability to participate in the event
- Unwelcome sexual advances, requests for sexual favors, or other unwelcome physical, verbal, visual, or other conduct of a sexual nature
- Inappropriate, unnecessary, or irrelevant use of nudity and/or sexual images
- Intimidating, harassing, abusive, defamatory, profane, discriminatory, derogatory or demeaning speech
- Harmful or prejudicial verbal or written comments or visual images related to personal characteristics
- Deliberate intimidation or stalking
- Harassing photography or recording
- Sustained or repeated disruption of talks or other events
- Express or implied threat of physical or professional harm
- Actual or threatened personal or professional retaliation for a rejection or report of unacceptable behavior
- Failing to stop unacceptable behavior when requested by a participant or IRI
- Disruption of presentations during sessions, in the exhibit hall, or at other events organized by IRI throughout the virtual meeting.
- Presentations, postings, and messages that contain promotional materials, special offers, job offers, product announcements, or solicitation for services.
 - IRI reserves the right to remove such messages and potentially ban sources of those solicitations.
- Copying or taking screen shots of any Q&A, chat room, or similar activity that takes place in the virtual space.
- Discussions that violate IRI's anti-trust guidelines, which are available on IRI's website at https://www.myirionline.org/docs/default-source/default-document-library/iri-antitrust-guidelines_022020.pdf?sfvrsn=2
 - Attendees are encouraged to immediately bring any anti-trust concerns to the attention of an IRI staff member so that such concerns can be addressed promptly and the discussion can be redirected, limited, or stopped in order to ensure compliance with IRI's anti-trust guidelines.