



National Association of  
Insurance and Financial Advisors  
California  
1451 River Park Drive Suite 175  
Sacramento CA 95815-4520  
(916) 646-8600  
Fax (916) 646-8130  
office@naifacalifornia.org  
www.naifacalifornia.org

## *IFAPAC Policies & Guidelines*

It is important to the current and future success of our political fundraising efforts, and effective use of those PAC funds, to communicate policies and guidelines regarding who should be receiving our contributions, when should contributions be made, and when not, how should contributions be handled and delivered, and why contribution requests may or may not be in the best interests of insurance and financial advisors.

### **A. General PAC Strategy**

The cornerstone of any sound political action committee (PAC) strategy is twofold:

1. The PAC must make decisions and take actions to promote the political interests of the PAC contributors. The political interests promoted within the context of NAIFA-California's PAC relate only to member insurance agents and their clients. Other political issues such as party affiliation or social issues (e.g. gun control) are irrelevant and are not considered.
2. The PAC must promote this interest in a manner that is consistent with the fiduciary duties that the PAC Board has toward the contributors, and in compliance with the mission of NAIFA-California as interpreted by its Board of Trustees and Officers. Specifically, this means that PAC funds will be allocated and spent only to accomplish the goals set forth in A.1 above. Funds cannot be contributed for other reasons.

### **B. Specific PAC Strategy**

Simply stated, it is our intention to allocate funds specifically to further the goal of "assisting our friends and supporters" and "not assisting those who do not support our causes". Again, two factors are relevant in carrying out this strategy.

1. The campaign of those candidates or office holders who understand issues affecting NAIFA-California's members and our clients, and are in a position to have a positive effect on these issues as they are presented in the political and regulatory arenas are potential recipients of PAC funds.
2. In order to receive PAC contributions, the candidate or office holder must be in general agreement with NAIFA-California's core values as referred to in A.1 above.

Therefore, it is our goal to not provide PAC contributions, except under the clear guidelines established above. In this manner, it is the belief of the NAIFA-California IFAPAC Board that the fiduciary duties are being carried out and the legislative efforts of the NAIFA-California membership, as a whole, are being enhanced.