



## **Member Identification Policy**

### **I. Purpose of Policy**

The purpose of this policy is to secure and protect CTPF members' account information and to ensure privacy and confidentiality. Fund employees must perform proper due diligence to confirm they are speaking with a member over the phone, in the office, or in the field before releasing and/or discussing member information.

### **II. Definitions**

Field – All member related events held offsite.

### **III. Scope**

All Fund employees will adhere to this policy.

### **IV. Policy**

All Fund employees will follow the Member Identification Procedure before releasing and/or discussing member information with a member over the phone, in the office, or in the field.