

**Staff Policies Regarding Release of Member Information**  
**Approved by Executive Committee September 2015**

**Contact information**

- Contact information found in the membership directory may be shared with the member, other members and the member's affiliated company. This includes:
- Name and designation
- Mailing Information, including email
- Office Phone
  - Note: The home telephone number should not be provided without the member's approval.

**Demographic Information**

- Member Age and Date of Birth may be shared with the member or the affiliated company.
- Gender may be shared with anyone.

**Membership Information**

- A member's MDRT ID number may be provided to only the member or to the member's affiliated company.
- The member's Court of the Table or Top of the Table status may be shared with the member, other members and the affiliated company.
- A copy of the completed application may be released to the member only upon receipt of a written request. It may be sent only to the postal or email address on file.

*Note:* MDRT occasionally receives a subpoena for membership records. These should be forwarded to the Member Services Director.

**Company Affiliation Information**

- Company affiliation is released only to the member or to the company that individual lists affiliation with. Example: If the member is affiliated with New York Life, you could inform New York Life of his affiliation. If another company inquires, you may confirm membership, but not disclose what company he is affiliated with.

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**Production Information**

- Detailed production information may be released to the individual member after verifying her identity or by written request. It may be sent only to the postal or email address on file.
- Production information may be released to the member, the certifying officer on record, or the person who signed the certifying letter.
- Only the production reported by **that specific** company may be shared with a company. The member's total production or production reported by any other company may not be provided.

**Payment Information**

- Detailed payment information is not released to anyone, including the member.
- For credit cards, the card type (Visa, American Express, etc.) and the last four digits may be released to the member.

**MDRT Foundation Information**

- A member's Foundation Knight status may be shared with anyone inquiring.

**Consumers and Press**

- Only current membership should be addressed (confirmed or not confirmed).
- Inquiries from the press should be forwarded to the Marketing Department.

**Exceptions**

On occasion, exceptions will be made to these policies. Some departmental exceptions have been made and are currently in use; for example, Global Markets shares some information with the MCC as befits its purpose within the organization. Questions regarding exceptions should be directed to the Member Services Director.

A reference sheet addressing a variety of data fields and their usage is attached.