



ANNUITY RATES INSTANTLY

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The Advisor Advantage Pre-Screening Process

Editor & Site Author
[Dick Van Dyke](#)

Advisor Requirements & Standards

- Retirement planning: Advisor has expertise in balanced portfolio annuity allocations
- At least three years of experience in financial services
- Annuity experience demonstrated by a minimum of \$5,000,000 in annuity allocations
- Successfully passed an annual seven year background check
- In good standing with the Better Business Bureau
- Insurance licensed for a minimum of three years
- Must supply references upon a prospective client's request
- Accepts the Code of Ethics & Required Standards by AnnuityRatesInstantly.com (ARI)...

Advisor Accepted Code of Ethics

Advisors selected to assist with AnnuityRatesInstantly.com's site visitors agree to the following Code of Ethics. Advisors accept that any known established material violation will result in not being able to assist with any further site visitors requesting advice and assistance from AnnuityRatesInstantly.com.

The ARI Code of Ethics concerning pre-screened Advisors are as Follows:

- Advisors are never to make contact unwelcome or uninvited.
- The advisor's responsibility is to offer answers to satisfy each individual's financial concerns.
- Advisors are required to supply and verify upon request the documents validating their compliance with AnnuityRatesInstantly.com's requirements as a selected advisor.
- Advisors will at all times be fully truthful with all individuals seeking their financial guidance and assistance.
- The Advisor must work in a spirit of full cooperation always looking out for the highest and best interest of all individuals seeking their assistance.
- The advisor will always make full disclosure of known available options and never knowingly withhold information that potentially could add a benefit or cause any harm.
- Any and all conflicts of interest will be immediately and fully disclosed.

- Advertising, marketing and presentation materials will be truthful, suitable for the clients full understanding and compliant with state and federal standards and regulations.
- Advisors are required to immediately disclose any negative material changes to their seven year comprehensive annual background check.
- Market performance, potential returns and levels of risk must be stated realistically and truthfully.
- In the event that specific legal, financial or tax advice is needed that exceeds the advisor's expertise, the advisor will willingly defer to a properly qualified professional.
- Continuing Education as required by law and credentials will be ongoing. Advisors must stay current with changes in the financial landscape.

As an Advisor, I have met and can verify the above mentioned Requirements and Standards and in Good Faith do agree to abide by and accept the Code of Ethics.

Advisor: X

Wendy Van Dyke

Date

07-08-09

Annuity Rates Instantly Pre-Screened Advisor Limitations: *These are our Requirements and Standards and Code of Ethics that help you as a site visitor when choosing an Advisor to assist you. It is your responsibility as a site visitor to ask for and verify documentation to be certain that this advisor meets the requirements above as they have indicated in written form by signing this agreement. This document does not guarantee competency or honesty it does however give you as their potential client a basis to openly verify many different facets about this advisor so that you can do your due diligence more effectively before you decide to begin an advisory relationship. Any Advisory relationship should be based on various disclosures and third party sources validating the Advisor that you are considering to assist you.*

Your Retirement Deserves a Second Opinion!