

Mission Statement

The Asian American Insurance & Financial Professional Association (AAIFPA) is a national non-profit organization, and our vision is to serve the Asian American insurance and financial professionals nationally. We offer a platform to advance knowledge in insurance and financial planning professions, and to provide a network among members of Asian descent through its federation of local Chapters. Formally established in 2007, AAIFPA is the first insurance and financial professional membership organization in and for the Asian community nationwide.

The objectives of the organization are to:

- Assist local Chapters and cooperate with affiliated professional organizations, and to have a national platform to share ideas and experiences.
- Advance professional knowledge and skills in insurance and financial service professions.
- Increase public awareness and promote the critical role of insurance in a sound financial plan within the Asian American Community.
- Furnish as an alliance to safeguard the interests and professional image of members.
- Promote educational activities and networking opportunities among members.
- Advocate the highest degree of ethics and professionalism among members.

Code of Ethics

1. All local chapter members shall abide by all laws and regulations of the United States and the state in which he/she is residing, the by-laws & the code of ethics of AAIFPA and all rules of conduct which are prescribed in the code of ethics of other professional organizations to which he/she also belongs.
2. All local chapter members shall treat all members and non-members alike with courtesy and respect.
3. All local chapter members shall be objective in providing opinions about various insurance or financial products to others, and avoid making any misleading statements.
4. All local chapter members shall not disclose any confidential information without the specific authorization from the source of information.
5. All local chapter members shall assist in promoting the public awareness and understanding of the importance of insurance and its effective use in risk management process.
6. All local chapter members shall maintain the highest degree of honesty and integrity.
7. All local chapter members shall perform professional services in a manner that is fair and reasonable and disclose any potential conflict of interest in providing such services. In no event shall a member engage in any act of self-dealing.
8. All local chapter members shall continue to maintain and improve his/her professional knowledge, skills and competency, and shall strive for the best services to others.

AAIFPA Member Benefits

- Professional Education
- Industry Networking
- Community Advocacy

Asian American Insurance & Financial Professional Association



Dallas Chapter AAIFPA- Dallas Chapter

President Hahn Lee

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President's Message



There are right seasons for all things we do in life. There is a time to be born and a time to die, a time to plant and a time to harvest, a time to open and a time to close, a time to gather and a time to scatter, and so on. For the members of AAIFPA Dallas local chapter I believe now is our season to grow.

Dallas area chapter was born 3 years ago inspired by a few leaders and now it has passed its infancy. I would like to thank Suzanne Chen especially for her selfless devotion in establishing and nurturing local chapters. Looking ahead of our next two years in DFW I believe we have arrived to an opportune moment to grow and deepen our organizational root in our local communities. We would like to achieve this by upholding and implementing following key directives:

1. We will drive our local membership. There are hundreds of Asian financial professionals in our local communities who would greatly benefit from AAIFPA activities. By uniting and organizing ourselves, we can provide an ideal channel to voice our unique interest serving Asian communities.
2. We will provide professional education and networking events on a continuing basis. Educational programs involving industry experts combined with networking opportunities for members and prospective members would provide ideal platform to enhance professional standard as well as increase membership.
3. We will broaden and deepen our organizational root by collaborating with other Asian focus organizations. After establishing a stable and regular membership we will reach out to other organizations to increase Asian communities awareness and practice of sound financial planning and implementation.

We are excited to move forward and do our shares in building Dallas chapter to its better future. I would like to thank our dedicated board members for their valuable contribution of time and efforts in this worthy endeavor. We also would like to extend our heartfelt gratitude to national board for its continuing guidance and support for our growth. We will uphold and steward the mission of AAIFPA.

Sincerely,

Hahn Lee

Board Members



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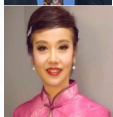
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Local Membership Application/ Renewal Form

Please print or write legibly

Please print or write legibly

- Would you be willing to do volunteer work for AAIFPA?
 _____ Yes _____ No

I would like to volunteer in the following areas:

- Professional Education
- Industry Networking
- Community Relations
- Other, please specify

- What is your specialty and expertise in financial services?

- What are your expectations from AAIFPA?

Annual Membership Due: \$50/ Year

Lifetime Membership: \$300/ one-time

Please mail this form together with your membership due to AAIFPA address OR deliver it to any of our board member

[5600 Tennyson Pkwy., Suite 140, Plano, TX 75024](mailto:5600TennysonPkwSuite140@plano.tx.us)

Please pick up your Membership Package when you attend Future AAIFPA functions.

Member's Name: _____

Email Address: _____

Cell Phone: _____

Company & Title: _____

Mailing Address: _____

Membership Due Included: \$ _____ [] Check

Received by: _____

Date: _____