



CRTS Code of Conduct

Certified Relocation and Transition Specialist™

Code of Conduct, Ethics and Professional Practices

This Code has been developed and adopted by the NCBAC to protect the public and all Certified Relocation and Transition Specialists™ (CRTS™) and to promote professional standards within the senior move industry.

It is a requirement for certification that all comply with the Standards and Rules set forth in this Code. CRTS™ designees must also follow all rules and regulations for their profession that are promulgated by state and federal law, licensing boards, state agencies, companies, and industry organizations of which the CRTS™ designee is a member and must fulfill all Continuing Education requirements.

CRTS™ designees also agree to carry appropriate business and liability insurance for their services and to comply with local and state laws governing employees and worker's compensation.

Professionalism

- I will be candid and truthful in all my professional communications.
- I will not undertake any professional responsibility unless qualified and shall perform my work competently and with respect to my client, their person and possessions.
- I will honor all business contracts, agreement and commitments.
- I will not participate in, promote or sanction any acts of discrimination within my business.
- I will promote the practice of senior client advocacy and adhere to industry guidelines concerning Care, Accountability, Loyalty and Disclosure in all my business dealings and client relationships.

Integrity

- I will refer my clients only to individuals, necessary services or organizations qualified to serve the client's needs and requests. I shall not endorse nor represent any individual not qualified or incapable of serving such needs.
- I will not engage in any form of misleading promotional activity or false advertising and will accurately represent my available services to clients and will avoid business practices which may pose a conflict of interest.
- I shall not encourage or support any breach of professional conduct or violation of this Code among my peers.
- I will not discount fees for the sole purpose of soliciting the client of another CRTS™ Certified professional or interfere with their existing client relationships.
- I shall not knowingly cause injury to the reputation of another CRTS™ Certified individual and will use the processes outlined by the Ethics Oversight Committee to register any complaints.



CRTS Code of Conduct

Confidentiality

- I will not divulge confidential information shared by my clients or business associates, with the exception of those instances where I believe there to be health or welfare at risk, and in those instances, contact the proper authorities.
- I will not represent confidential information, including unauthorized CRTS™ materials, as my own in order to benefit me or my business.
- I will not make available or sell information intended for CRTS™ member use to another individual or entity, including mailing lists, study guide and electronic information.
- I will not use photographs and marketing materials without the express written consent of my clients, CRTS™, or the individual or entity owning the rights to the materials.
- I shall not use the CRTS™ designation and/or marks in any media or for any purpose whatsoever either orally or in writing should my designation be revoked or if I choose not to meet professional requirements.

I understand the rules of the Ethics Complaint Procedure as follows:

Conflicts and ethical questions will be resolved through confidential review by the Professional Practices Committee per the [Ethics Complaint Procedure](#) document provided to me by CRTS™ upon graduation and/or certification renewal.

I agree to uphold the CRTS™ Code of Conduct, Ethics and Professional Responsibility in order to protect public interests; to demonstrate competence and quality of service; to maintain confidentiality of information; to avoid conflict of interests and to uphold my professional responsibility. Having selected "I Agree" to the Compliance Statement on the online application you have provided your electronic signature that you agree to the above.

Insurance:

All CRTS™ carry business liability insurance and comply with state worker's compensation laws.

Service Agreements:

- CRTS™ will not sign any third party contract as an agent of the client unless they carry the appropriate professional liability insurance.
- CRTS™ will understand and abide by Guardianship and Power of Attorney guidelines when adult children, friends or relatives wish to be involved in service agreements, payments and distribution of household goods.