

Corporate Affiliate Guidelines

Provided by the NAST Corporate Affiliate Advisory Board as of April 12, 2023

The National Association of State Treasurers seeks to promote and strengthen policies, education and legislation that support and enable member states to pursue and administer sound financial practices and programs. To further the objectives of NAST, the Corporate Affiliates Program was established to provide private sector service providers and professionals the ability to support NAST with their expertise, experience and quality business practices. Corporate Affiliate members benefit from a robust public-private partnership with State Treasurers and their staff. Membership in NAST involves both opportunities and responsibilities that are outlined in the following guidelines.

I. Code of Ethics:

Representatives of Corporate Affiliate members are enjoined to adhere to the following legal, moral, and professional standards of conduct in the fulfillment of their professional responsibilities:

- A. *I will be fair, honest, respectful and professional, and act in good faith in all my relationships with State Treasurers and their staff, employees of NAST, and other Corporate Affiliates.*
- B. *I will uphold and comply with all governing codes, government and municipal statutes and rules, including rules and policies restricting gifts and entertainment, which apply to my involvement with NAST and State Treasurers*

II. Guidelines for Representatives of Corporate Affiliate Members:

- A. Corporate Affiliates should have an overriding interest in promoting the success of NAST and be prepared to actively participate to ensure a viable organization.
- B. NAST events are structured to promote relationship building, as opposed to selling. Successful Corporate Affiliates understand that relationships take time to build. Treasurers welcome the opportunity to meet and socialize with Corporate Affiliates during the conference events; however, it would be inappropriate for a Corporate Affiliate to make a “sales pitch” at a NAST event.
- C. Corporate Affiliates are encouraged to fully attend NAST events and are welcome at all events other than those that are explicitly designated as “Treasurer-only.” Treasurers’ round-table discussions and business meetings are generally open to Corporate Affiliates to attend as observers.
- D. Corporate Affiliates are prohibited from scheduling events that conflict with any NAST scheduled event. For example, if there is a NAST sponsored dinner, do not make alternate arrangements that would take Treasurers and staff away from the conference event. This assures all Corporate Affiliates equal opportunities to utilize NAST events to establish and build their relationships with Treasurers and their staff.
- E. Corporate Affiliates have the opportunity to contribute their expertise and experience to State Treasurers and their staff through speaking roles at NAST events (conferences, webinars, etc.) The Program & Learning Committee for NAST will periodically solicit topics/speakers in advance of various conferences and webinars. Corporate Affiliates are encouraged to submit timely and complete responses to the Committee to achieve the best outcome for your organization.

- F. The NAST Corporate Affiliate Advisory Board serves as the liaison between Treasurers and the Corporate Affiliates. You are encouraged to share thoughts, ideas or issues with Advisory Board members to improve the experience of Corporate Affiliates or address concerns. You can find contact information for Board members on the NAST website or find them during conferences wearing an Advisory Board ribbon on their name tag. The Advisory Board meets at each conference, and all Corporate Affiliates are invited to attend the Board meeting.
- G. Corporate Affiliates interested in joining the Corporate Affiliate Advisory Board should respond to the annual invitation from NAST to express interest in serving on the Board. Candidates may also inform any member of the Board of their interest. Advisory Board members serve 3-year terms and are selected for attributes that bring diversity, including geographic and professional diversity to benefit NAST.
- H. Corporate Affiliates are encouraged to support NAST through sponsorships of conferences and other NAST programs. NAST is committed to creating value for sponsorships by providing visibility, advertising, and other meaningful tangible benefits.
- I. Communications from NAST to Corporate Affiliates are sent to the person designated as the Principal at your firm and to any other contacts submitted to NAST for its email distribution list.
- J. NAST publications are available as part of membership and can be found on NAST's website. These publications can be useful research tools that may aid you in your marketing efforts. The website also has links to each State Treasurer's office.