

This Notice Must Appear and Be Prominently Posted at All AAI In-Person Chapter Meetings



Health & Safety Protocol for In-Person Chapter Meetings*

Modified 5/12/2023

The American Association of Individual Investors (AAII) strives to provide its members and guests with the opportunity to participate in meetings in a safe environment. Accordingly, AAII has adopted this health and safety protocol for in-person chapter meetings.

When gathering in person, chapter leaders and attendees must adhere to federal, state and local laws and guidelines related to infectious diseases—including, but not limited to, COVID-19 and its variants—as well as guidance published by the Centers for Disease Control and Prevention (CDC)[†].

All individuals must specifically:

- Follow CDC, state and local guidance;
- Follow facility requirements, if any;
- Adhere to applicable face mask requirements if in place; and
- Observe proper hand hygiene and respiratory etiquette.

In an effort to reduce the risk of spreading infectious diseases—including, but not limited to, COVID-19 and its variants—and in addition to the above, we ask chapter leaders to:

- Provide a refund or offer a credit if an attendee cancels for a health-related reason, or if a state or local authority prevents the meeting from occurring;
- When possible, arrange for alternative ways for members to attend the meeting, for example, providing livestreaming or other remote options. Follow livestreaming best practices so that online attendees feel that they are receiving the same level of service and amenities that in-person attendees receive. All participants, whatever their health status or personal preferences, should feel welcome and valued no matter how they choose to engage with AAII.

Any questions regarding this protocol should be directed to chapters@aaii.com.

* This protocol was prepared based on guidance from the CDC. AAII cannot guarantee the effectiveness of this material to prevent the spread of infectious diseases among members and guests. Where state or local laws or guidance provide for additional restrictions, such laws apply. This protocol is effective on 05/12/23 and AAII reserves the right to add, modify, revoke or change this protocol, in whole or in part, at any time, and as additional information becomes available.

[†] CDC information can be found here: <https://www.cdc.gov/coronavirus/2019-ncov/index.html>