AI Acceptable Use Policy (Adopted by NAIFA Board 11/08/2026)

This artificial intelligence (AI) Acceptable Use Policy outlines guardrails for the use of AI tools for NAIFA programs. This policy aims to ensure that AI use maintains the integrity, security, and quality of NAIFA activities.

This policy applies to all NAIFA programs and to all NAIFA members, volunteers, staff, contractors, consultants, and interns, when using AI on behalf of NAIFA or Life Happens. This policy is considered part of the NAIFA staff Employee Handbook.

Responsible AI use supports NAIFA's position as the leading, forward-looking, association for financial professionals, while protecting NAIFA's credibility and operations.

I. AI Tools Require Approval

Only use AI tools approved by IT, to ensure secure and consistent operations.

A. When using AI to support work at NAIFA, staff may only use AI tools approved by the Vice President, Technology & Operations. Staff must receive approval to use AI tools, such ChatGPT, Claude, Gemini, Perplexity, or AI tools available through other platforms (e.g., Zoom), including approval for AI tools already in use.

B. Approval for use of AI tools is not required for pre-approved AI tools included with a NAIFA or Life Happens subscription, such as Copilot (included with NAIFA's Microsoft 365 subscription), or commonly used AI applications embedded in search engines on NAIFA-provided computers or devices (e.g., Google AI Mode).

C. Staff may only use AI tools for NAIFA work on NAIFA-provided computers or devices or on NAIFA-provided applications or platforms (e.g., Microsoft 365). Staff may not otherwise use AI tools on personal devices for NAIFA work.

II. Protect Confidential and Sensitive Information

Prevent AI from collecting and disclosing confidential and sensitive information.

A. Generally, no confidential information or data of NAIFA or Life Happens may be disclosed to AI tools. This prohibition includes confidential information and data that is proprietary, financial, strategic, or relates to NAIFA membership, sponsorships, vendors, partners, or legal, HR, or other sensitive matters. All sensitive information disclosed to AI tools must be anonymized.

B. Information pertaining to NAIFA or Life Happens may be disclosed to an AI tool, if necessary, but only if the AI tool maintains the information within a NAIFA organizational subscription. NAIFA IT can help confirm an AI tool's privacy status.

C. AI tools must be used in a way that maximizes data protection and privacy,

including enabling features that (1) prevent use of NAIFA-provided information to improve or train an AI platform (outside of NAIFA's use); (2) block the sharing of NAIFA-provided information with third parties; and (3) encrypt or delete information shared with an AI tool. NAIFA IT can ensure proper use of AI tools.

D. Report to NAIFA IT any improper disclosure of confidential information to AI tools.

III. Protect Intellectual Property

Intellectual property rights for AI-generated content are uncertain. AI tools may generate content containing or infringing a third party's intellectual property.

A. Do not use AI-generated content that infringes intellectual property rights.

B. Do not input a third-party's intellectual property into an AI tool.

C. Do not assume that AI-generated material is NAIFA's intellectual property.

IV. Limit the Use of Transcription Tools to Maintain Confidentiality

A. AI meeting transcription tools should not be used unless necessary and must never be used for meetings containing confidential or sensitive information.

B. AI transcription tools should be used only by staff hosts, not meeting attendees.

C. AI transcription tools may be used only with permission from meeting attendees.

V. Ensure Accuracy and Fairness

A. AI tools make mistakes and may generate responses that are false, misleading, or invented. All AI output must be verified and double-checked for accuracy.

B. Ensure that AI-generated output and AI programs are reliable and free of bias.

VI. Ensure Accountability, Authenticity, and Use of the NAIFA/Life Happens Brand

AI tools must not replace human judgment, accountability, or decision-making.

A. Do not use AI text, graphics, or other content that is unreviewed or unedited.

B. When using AI-generated content, ensure the content has an authentic voice consistent with the NAIFA or Life Happens brand.

C. Disclose when AI is used in a material way to generate content.