

Qualifications & Guidelines

- 1. The qualification period will be from May 1, 2023, to March 31, 2024. Only net paid annualized premium produced during the qualification period will count for conference qualification.
- 2. A minimum portfolio persistency of 80% is required.
- 3. A minimum active policy count of 75 active applications is required. For newly contracted agents the minimum is 50 applications.
- 4. The Company will confirm qualification for the conference by a personal invitation to the associate.
- 5. Only active contracted and producing associates in good standing at the time of the conference will be eligible to attend the conference.
- 6. Invitations are non-transferable and substitutions are not permitted.
- 7. All qualifiers are eligible at one level (example: an agent who personally produces and has an agency is unable to qualify at both levels).
- 8. Production credit is not transferable among associates or agency managers. Multiple associate qualifications are not allowed.
- 9. If an associate qualifies for the conference on a personal, agency or Marketing Director basis, the associate will only be awarded one qualification.
- 10. Agency management qualification will be limited to one qualifier per management level (Agency, Marketing Director). A second agency management qualification at the same management level will require a higher agency production amount.
- 11. Cash will not be paid in lieu of attending the conference.
- 12. The qualifying associate will be allowed to bring their spouse or guest.
- 13. The Company reserves the right to modify or cancel the event if deemed necessary.
- 14. The company reserves the right to modify qualification rules in the event of unforeseen expense increases or if hotel space is not available (rooms are contracted one year in advance and space may not be available; in the event of this, qualification will be based on higher production/persistency).
- 15. In accordance with IRS rules and regulations, associates attending our Chairman's Club Conference will receive 1099 earnings for the fair market value of the trip. Please consult your tax advisor if you have any questions concerning your income reporting requirements.
- 16. Any exceptions to the above guidelines or special requests must be approved by the Chief Marketing Officer of the Company.

