

ARUBA

LEADERS' CONFERENCE 2021
THE RITZ-CARLTON

APRIL 7 - 11, 2021

Assurity®

WORKSITE QUALIFICATION RULES

2021 Leaders' Conference Qualification Rules

Assurity Worksite Sales

Qualification Period

Jan. 2, 2020 through Dec. 31, 2020

Eligibility

Worksite contracted entities are eligible to qualify for the Leaders' Conference. A qualifier who is invited to attend the Leaders' Conference may invite a spouse, a family member or a guest, approved by the company, to attend at the company's expense. Office staff, clerical support and/or other producers/distributors are not approved guests for Leaders' Conference attendance.

Worksite Sales Qualification Requirements

Personal Production = \$200,000 and three new groups
Firm Production = \$1,000,000 and three new groups

Contract Date	Jan. 2020 or before	Feb. 2020	Mar. 2020	Apr. 2020 or later
Personal	\$200,000	\$183,334	\$166,667	\$150,000
Firm	\$1,000,000	\$916,667	\$833,333	\$750,000

Personal production cannot be combined to reach qualification requirement of \$200,000 and three new groups.

A Firm must meet the \$1,000,000 requirement (or above) for one attendee.

Chairman's Circle Requirements

Qualify for an additional night stay, along with a Special Chairman's Circle Recognition dinner. No pro-rata allowed.

Personal Production = \$300,000 and three new groups

Firm Production = \$1,500,000 and three new groups

Assurity producers **appointed to sell Individual and Worksite products** are eligible to qualify for the 2021 Leaders' Conference based on their combined production. Production for each product line will be recorded and measured as a percentage of the qualification requirement. If the sum of all production percentages is 100 percent of the total requirement or greater, the producer will qualify.

Rules

1. Qualification is based on gross annualized premium credits, which is the first mode premium projected to an annual basis. (Adjustments are made for reissues and replacements.)
2. Leaders' Conference qualification follows the commission credit.
3. Business must be issued and the first premium must be paid. Previously credited unearned premium will be deducted from annualized premium credit if policies lapse.
4. When using the pro-rata requirement, the qualification is based on contract date, not on date of first business turned in.
5. If the qualification requirement is met, the firm's principal may select an individual to attend on his/her behalf, subject to home office approval. This individual must be licensed and appointed with Assurity Worksite and be a member of the firm.
6. Qualifiers must hold a current contract and be in good standing with Assurity Worksite at the time of the Leaders' Conference to be eligible to attend.
7. An adult guest may not be another licensed agent unless he/she is qualifier's spouse/significant other.
8. Qualification for Leaders' Conference is not redeemable for cash or other remuneration. There is no cash equivalent or other award if a producer does not accept an invitation to the Leaders' Conference.
9. A 1099 will be issued to all Leaders' Conference attendees (qualifier and spouse/guest) for the fair market value of the trip. Assurity reserves the right to charge a qualifier's account, due to late cancellation or failure to attend, for actual expenses incurred by the Company on behalf of either the qualifier and/or spouse/guest, to include but not limited to airfare, hotels, transfers, activities and functions.
10. A 1099 will be directed to the code from where production came to qualify for the trip. If the commission is assigned, then the 1099 will follow to where the commission is paid.
11. The following items are included for qualifier and spouse/guest only: Airfare – a roundtrip ticket from designated gateway cities in the U.S. converging at a hub airport for travel to the Conference site, four nights lodging, hosted meals and hosted activities. If a qualifier does not have a spouse or significant other, or when such person cannot attend the meeting for sound reasons, we will welcome a relative of the qualifier who is at least age 18.

continued

Rules (continued)

12. Air travel reservations must be made through Assurity's selected travel representative. Any additional pre- or post-extension for air travel, which changes the cost of travel for the Conference dates, will be at the qualifier's expense. Any change of itinerary, which incurs a change fee or an additional cost of the ticket, will be at the qualifier's expense. Any pre- or post-Conference arrangement for rooms must be handled between the qualifier and Assurity's selected travel representative and is dependent upon room availability.
13. Any expense other than airfare incurred during travel by qualifier and spouse/guest to the Conference site, including airport parking, meals while in route to Conference, mileage to airport from home, any hotel expense the night before or after departure, etc., will be at the qualifier's expense.
14. Attendance at Leaders' Conference is by home office invitation only. Initial qualification is subject to later loss of qualification due to lapses.
15. Invitation to the Leader's Conference cannot be transferred.
16. Conference qualifications and guidelines cannot be modified, except in writing by a senior officer of Assurity. Continuation of future Leaders' Conferences is at the discretion of Assurity.

Note: These rules supersede any and all prior rules or agreements for Leaders' Conference qualification. All rules are at the discretion of Assurity and may be modified to meet changes that may occur during the qualification period. The decision of Assurity on any interpretation of these rules shall be conclusive.

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