

Leaders' Conference 2018



# DESTINATION AUSTRALIA

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Sydney, Australia  
Four Seasons Hotel  
April 14-20, 2018  
(includes travel time)



Qualification Rules for  
Worksite Sales



# 2018 Leaders' Conference Qualification Rules

*Assurity at Work®*

## ***Qualification Period***

Dec. 31, 2016, through Dec. 29, 2017.

## ***Eligibility***

Brokers and firms contracted under the Assurity at Work division 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.

<b>Worksite Qualification Requirements</b>				
<b>Hierarchy Production</b>				
MGA/Broker Firm	For hierarchy to qualify, they must have five downline qualifiers			
<b>Personal Production</b>				
Contract Date	Jan. 2017 or before	Feb. 2017	Mar. 2017	Apr. 2017 or later
Broker	\$125,000	\$114,583	\$104,167	\$93,750
Three new group minimum				

Assurity producers **appointed to sell Worksite and Individual products** are eligible to qualify for the 2018 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. Contest rule #18 applies here also.

	Worksite	Individual Sales	
Actual Production	93,750	31,500	
Qualification Requirement	125,000	90,000	
Percent of Qualification	75%	35%	110%

## **Chairman's Circle Requirements**

Qualify for an additional night stay in Sydney, along with an upgraded room and special recognition dinner.

**Personal Production = \$300,000**

**Minimum of 4 new cases. No contest credit allowed.**

# ***Rules***

1. Producers with a \$125,000 qualification requirement may qualify a second attendee by producing \$250,000 and a third attendee at \$375,000 subject to home office approval. In addition to qualifying for Conference, production of \$300,000 qualifies the producer for Chairman's Circle. Producers may use the \$300,000 production to attend Chairman's Circle or qualify a second attendee for the Conference - not both.
2. Leaders' Conference qualification is based on all gross annualized premium with a **three new group minimum**, which also applies to Rule No. 1.
3. Broker's 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.)
4. Broker's business must be issued and the first premium must be paid. Previously credited unearned premium will be deducted from annualized premium total as and if policies lapse.
5. An individual placed under contract April 1, 2017 or later must meet at least 75 percent of the full requirement. The qualification requirement is based on contract date, **not** on date of first business turned in.
6. If an agency meets the qualification requirement for the contract that it holds, the agency 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 at Work and be a member of the agency.
7. Qualifying premium **cannot** be transferred or assigned from the writing agent to another agent.
8. Qualifiers must hold a current contract and be in good standing with Assurity at Work at the time of the Leaders' Conference to be eligible to attend.
9. An adult guest may not be another licensed agent unless he/she is qualifier's spouse/significant other.
10. 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.
11. 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.

*continued*

## **Rules** (continued)

12. 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.
13. 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.
14. Any expense other than airfare incurred during travel by qualifier and spouse/guest to the Conference site, including airport parking, meals while en 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.
15. Attendance at Leaders’ Conference is by home office invitation only. Initial qualification is subject to later loss of qualification due to lapses.
16. Invitation to the Leader’s Conference cannot be transferred.
17. 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.
18. The maximum amount of all 2017 contest credits for the 2018 Leaders’ Conference is 33 percent of your required qualification amount. Contest credits are cumulative for 2017.

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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