

# 2017 Business Solutions Incentives



**First Ever New Group Opened Incentive—\$150 CASH BONUS**

**Monthly Top Business Solutions Producer Incentive**  
**(EXCLUDES Broker Agreements)**

\$1,000 Cash Bonus to the B2B certified Associate with the most Solutions Sales for the month.  
 (Minimum of 100 Solutions sales for the month)

**New Groups Opened Incentive: With ACCELERATORS (INCLUDES Broker Agreements) Bonuses are CUMULATIVE!**

LEVELS	NEW GROUPS	Earn Any Level In 3 MONTHS AND EARN: <small>(Jan. 1—March 31)</small>	Earn Any Level In 6 MONTHS AND EARN: <small>(April 1—June 30)</small>	Earn Any Level In 9 MONTHS AND EARN: <small>(July 1—Sept. 30)</small>	Earn Any Level In 12 MONTHS AND EARN: <small>(Oct. 1—Dec. 31)</small>
Level 1	5	\$500	\$375	\$312	\$250
Level 2	10	\$1,200	\$900	\$750	\$600
Level 3	15	\$2,000	\$1,500	\$1,250	\$1,000
Level 4	20	\$3,200	\$2,400	\$2,000	\$1,600
Level 5	25	\$5,000	\$3,750	\$3,125	\$2,500
<b>CASH BONUSES ARE CUMULATIVE!</b>		<b>Hit Level 5 by March 31<sup>st</sup> &amp; earn \$11,900</b>	<b>Hit Level 5 by June 30<sup>th</sup> &amp; earn \$8,925</b>	<b>Hit Level 5 by Sept. 30<sup>th</sup> &amp; earn \$7,437</b>	<b>Hit Level 5 by Dec. 31<sup>st</sup> &amp; earn \$5,950</b>
<b>Plus 5 New Groups</b>		<b>\$500</b>	<b>\$500</b>	<b>\$500</b>	<b>\$500</b>

*Credit for a new group is given to the Servicing Agent noted on the Voluntary Benefit Authorization (Gold Card).*  
**Criteria to Participate:** The group must have five counters and the first payment must be received. A Small Business Sale must have the same payment method for it to count towards a group.

**Business Solutions Group Sales/Small Business Sales Incentive**

**Achieve the Level and earn Marketing Dollars plus a CASH BONUS. The sooner you hit the level the more you can earn! Plus, Bonuses are CUMULATIVE.**

Solution Sales Levels	Achieve Any Level in 3 MONTHS and EARN: <small>(Jan. 1—March 31)</small>	Achieve Any Level in 6 MONTHS and EARN: <small>(April 1—June 30)</small>	Achieve Any Level in 9 MONTHS and EARN: <small>(July 1—Sept. 30)</small>	Achieve Any Level in 1 YEAR and EARN: <small>(Sept. 30—Dec. 31)</small>
<b>Level 1</b> 50 Solution Sales	\$300	\$225	\$188	\$150
<b>Level 2</b> 150 Solution Sales 400 Marketing Dollars	\$1,000	\$750	\$625	\$500
<b>Level 3</b> 250 Solution Sales 600 Marketing Dollars	\$2,000	\$1,500	\$1,250	\$1,000
<b>Level 4</b> 350 Solution Sales 700 Marketing Dollars	\$3,000	\$2,250	\$1,875	\$1,500
<b>Level 5</b> 500 Solution Sales 800 Marketing Dollars	\$5,000	\$3,750	\$3,125	\$2,500
<b>Level 6</b> 750 Solution Sales 900 Marketing Dollars	\$8,000	\$6,000	\$5,000	\$4,000
<b>Level 7</b> 1,000 Solution Sales 1,000 Marketing Dollars	\$12,000	\$9,000	\$7,500	\$6,000
<b>Level 8</b> 1,500 Solution Sales	\$16,000	\$12,000	\$10,000	\$8,000
<b>Level 9</b> 2,000 Solution Sales	\$24,000	\$18,000	\$15,000	\$12,000
<b>CASH BONUSES ARE CUMULATIVE!</b>	<b>Hit Level 9 by March 31<sup>st</sup> and earn \$71,300!</b>	<b>Hit Level 9 by June 30<sup>th</sup> and earn \$53,475!</b>	<b>Hit Level 9 by Sept. 30<sup>th</sup> and earn \$44,563!</b>	<b>Hit Level 9 by Dec. 31<sup>st</sup> and earn \$35,650!</b>
<b>Plus 100 Sales</b>	<b>\$1,000</b>	<b>\$1,000</b>	<b>\$1,000</b>	<b>\$1,000</b>

# 2017 Business Solutions Incentives



## General Guidelines:

The following guidelines will pertain to the 2017 Business Solutions Incentives:

1. To be eligible for any 2017 Business Solutions Incentives you must be Group and B2B certified, a Broker or GA contracted with LegalShield prior to September 1, 2016, or enrolled in LegalShield Advantage, and in good standing at the time of the payout.
2. To be eligible to participate in the Business Solutions Incentives, an Associate must write a minimum of 25 Solutions memberships for the year, and 50% of their business must be Solutions business. All Solutions sales from January 1, 2017, will be included. All reports will be reviewed and processed by the 15<sup>th</sup> of each month.
3. Bonuses will be issued after qualifiers are determined, via a commission adjustment by the 15<sup>th</sup> of every month. Bonuses will reflect for 1099 tax purposes, and are not subject to charge back.
4. New Group/Small Business Incentive, New Groups Opened incentive are cumulative incentives and qualifying sales/groups from previous levels will count towards achieving higher levels. EXAMPLE: To reach Level 2 of the Group/Small Business Incentive you must have 150 Solutions sales, 50 of the Solutions sales from level one are included in the 150 Solutions sales (only need 100 Solutions sales to achieve level 2 after achieving level 1).
5. Persistency Requirements: In order to receive any 2017 Business Solutions Incentives, Associates, Brokers and General Agents must maintain a personal persistency that is within 3 percentage points of company average measured by Performance Club retention. Personal persistency and company average is tracked and displayed in the AO Portal under Reports>Performance Club>PC Retention - current year.
6. Recognition Guideline: LegalShield Incentives are designed to promote and motivate Associates through recognition. By participating in any LegalShield incentive or bonus program and to receive benefits, cash or otherwise, the Associate, Broker and General Agent agrees to have his/her full name, Associate title, level, or standing published and recognized in LegalShield marketing material, whether oral, written or electronic.
7. All inquiries regarding the 2017 group incentives should be directed to group services. All research and responses will be handled through group services in an effort to provide more efficient assistance to our sales force.
8. Monthly Top Solutions Producer, must have a minimum of 100 personal solutions sales for the month.
9. Credit for a new group is given to the servicing agent noted on the Voluntary Benefits Authorization (Gold Card).
10. A Qualifying Solutions sale is one that issues a counter or counters, tied to a franchise number and IS PROCESSED THROUGH THE B2B GROUP CHANNEL. The membership must have a 2017 production date. A counter is issued one time to a unique member. A unique member is a new purchaser of a plan (legal plan, or standalone Identity theft plan) regardless of which plan is purchased. A counter is not issued when adding a legal plan, identity theft plan, and IDShield plan to an active member or a member canceled in the last 6 months.
11. Reinstated memberships will count towards the incentives provided a counter has been issued for the sale (the membership must have been canceled at least 6 months, have a new writing agent and must not have an existing membership) ANY REINSTATEMENT WITH A FUTURE EFFECTIVE DATE WILL COUNT AS A QUALIFYING SALE IN THE MONTH IT WAS PROCESSED.
12. Add on memberships are excluded.
13. A membership that is processed without a payment ever clearing is considered a non-taken. Company reserves the right, in its sole discretion, to delay or deny bonuses if Associate personal non-taken rate is greater than 1% point variance of the overall company Group average of 4%.
14. Associates with multiple accounts, and Brokers/General Agents with multiple agreements per location will have sales combined for incentive purposes, if those agreements are combined through the performance club combined file program. For Brokers/General Agents with multiple locations, each location participates individually (provided they are on multiple agreements).
15. The First Ever New Group Opened is available one time per the life of the Associate. Must be the first group ever opened by the selling Associate/writing agent. Group must be an employer/employee related group.
16. A qualifying new group is one that: has a 2017 production date and meets participation requirements within a calendar year - participation requirements are shown in the chart below. Memberships used to meet the participation requirements must: be active, be unique members, make first payment (EX; SB 50 + 3 group members, all have to make the first payment before it counts as a new group opened). For a group to qualify, the qualifying Associate, Broker or General Agent, must write memberships in that group. A transfer membership will not count as an active member and will not be counted as part of the participation requirements.

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17. Groups must remain active throughout the calendar year to continue qualifying as a new group opened. If a group should cancel even after it becomes a qualifying group, it will be excluded.
18. Once a group becomes a qualifying new group, and one of the required unique memberships cancels, the group will remain a qualifying group for the purpose of the new groups opened incentive.
19. Reinstated groups will be included provided the group was canceled a minimum of 5 years and has a new writing agent. Any reinstatements processed before the 26<sup>th</sup> will count for the current month, between 26<sup>th</sup> and the 1<sup>st</sup> will count towards the next month.
20. Employer paid volume pricing (wholesale fringe) is excluded from any of the incentives, buy ups are included. For Fringe group over 250, we must receive 2 months payment and we will retroactively apply those counters in the month of the incentive that were sold.
21. Linked groups (duplicated groups, sister groups, or a group opened per existing group for any reason) will not be considered a new group. Linked groups generally have a common payroll department and or owner and are considered as one group. However the production and payments received on a linked group will count towards qualifying the main group provided the main group qualifies as a participating 2017 new group.
22. Individual and Organizational Group Accounts do not count as qualifying groups.
23. New groups processed in November and December of the current incentive year will be allotted until February 28, 2018 to make payments on the necessary five memberships to help the group become a qualifying group.
24. Small Business Sales will count towards Group Sales totals when: The selling Associate/GA/Broker is Special Forces Qualified, and/or the selling Associate/GA/Broker is Group Certified and has opened at least one group.

## GROUP AND SMALL BUSINESS SALES THAT QUALIFY FOR THE NEW GROUPS OPENED INCENTIVE

5 IDShield Plans Stand-alone Plans	5 Group Legal Plans	5 Group CDLP Plans	Combination of any five unique group members	Small Business Plans (must have the same franchise number and same form of payment)  <b>Examples:</b> Small Biz 10, 50 and 100 and Small Business Plans \$75 and \$125. Small Biz 10 is 1 counter, Small Biz 50 and 100 and Small Business Plans \$75 and \$125 are 2 counters each. First payment from Small Business must be received prior to bonus payout.  SB 10 + 4 Unique Members SB 50 + 3 Unique Members SB 100 + 3 Unique Members LegalShield SB \$75 & \$125 + 3 Unique Members

*LegalShield reserves the right to fully audit all incentives and bonuses and where necessary, in its sole discretion (e.g. for auditing purposes, etc.), delay payments to facilitate operational reviews. Further, LegalShield reserves the right to chargeback bonuses in cases where anomalies, etc., surface. LegalShield reserves the right to alter/change marketing dollars program at anytime without notice to the field during the incentive.*