

The Assurity logo is positioned at the top center of the page. It features the word "Assurity" in a clean, white, sans-serif font, with a registered trademark symbol (®) to its upper right. The background is a vibrant blue sky with a palm tree frond extending from the top left corner.

LEADERS' CONFERENCE  
2023

Naples

FLORIDA

MARCH 29 - APRIL 2, 2023

THE RITZ-CARLTON,  
NAPLES BEACH RESORT

INDIVIDUAL SALES QUALIFICATION RULES

# 2023 Leaders' Conference Qualification Rules

Assurity Individual Sales

## Qualification Period

Jan. 1, 2022 through Dec. 31, 2022

## Eligibility

All contracted producers in Individual Sales are eligible to qualify for the 2023 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.

**Your production qualification level is not based on the wording in your contract. To verify your production qualification required amount, contact Assurity at (800) 276-7619: Debby Springer at Ext. 4469 or Deb Thallas at Ext. 4465.**

## Individual Sales Qualification Requirements

Contract Date	Jan. 2022 or before	Feb. 2022	Mar. 2022	Apr. 2022 or later
<b>Hierarchy Production</b>				
NMO	\$550,000	\$504,167	\$458,333	\$412,500
MGA	\$280,000	\$256,667	\$233,333	\$210,000
BGA	\$135,000	\$123,750	\$112,500	\$101,250
GA	\$95,000	\$87,083	\$79,167	\$71,250
<b>Personal Production</b>				
All Contracts	\$90,000	\$82,500	\$75,000	\$67,500

## Product Weighting - Leaders' Conference and Chairman's Circle

All Assurity products are credited at 100 percent except:

Single Premium Whole Life and Annuities. . . . . 6 percent  
PUA and UL premium in excess of target premium . . . . . 6 percent

Qualified annuity sales or sales of other products where the source of funds is qualified money may not be eligible for Conference or Chairman's Circle qualification.

## Chairman's Circle Requirements

Qualify for an additional night stay and special recognition dinner.  
Hierarchy Production = \$950,000    Personal Production = \$125,000  
(Minimum 6 policies.)

Assurity producers **appointed to sell Individual and Worksite products** are eligible to qualify for the 2023 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. Producers may qualify by either personal or hierarchy production, but qualifying for both still only qualifies one attendee. (Only one invitation will be extended.)
2. 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.)
3. Business must be issued and placed. Canceled business will be deducted from gross annualized premium total.
4. Business written by the writing agent on themselves or their immediate family will not be counted toward conference qualification.
5. For 100 to 149 cases issued and placed, writing agent will earn an extra \$10,000 credit. For 150 or more cases issued and placed, writing agent will earn an extra \$15,000 credit. This applies to Leaders' Conference qualification only and not for Chairman's Circle.
6. Qualifying premium cannot be transferred or assigned.
7. If an individual or agency moves from one contract level to another during the qualification period, and they have qualified for Leaders' Conference prior to this level change, they will remain qualified. If not yet qualified when contract level changes, the qualification requirement will be pro rata at the old level and pro rata at the new level.
8. An individual being contracted in 2022 will have a pro rata requirement based on contract start date. However, if the start date is April 1, 2022 or later, they must meet at least 75 percent of the full requirement.
9. If a Marketing Organization meets the qualification requirement for the contract that it holds, the principal of that organization may select an individual to attend on his/her behalf, subject to home office approval.
10. Attendance is by invitation only.
11. Qualifiers must hold a current contract and be in good standing with Assurity at the time of the Conference to be eligible to attend.
12. An adult guest may not be another licensed agent unless he/she is qualifier's spouse/significant other.
13. 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.

continued

## Rules (continued)

14. 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.
15. 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.
16. 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.
17. 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.
18. 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.
19. 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: New York business does not count toward incentive credits. 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.

**Assurity**<sup>®</sup>