



2016 Trusted Choice® Marketing Reimbursement Program (MRP) Guidelines

The following seven bullet points give an overview of the program. For additional details, links, scripts and/or notes for each of these points, refer the Additional Details and Notes section on page 3.

1) What is the Marketing Reimbursement Program?

In order to deliver the brand experience to your customers consistent with Trusted Choice, Trusted Choice will reimburse a portion of expenses incurred **in 2016** by Trusted Choice agencies in co-branding advertising and marketing materials; and in creating or updating a digital presence to include the Trusted Choice logo, link to the Trusted Choice website and Pledge of Performance. This is not meant to replace your agency's brand, but to complement it by including the **Trusted Choice branding in your marketing efforts. Reimbursement will only be made for use of the Trusted Choice logo** (not the IIABA association logo, which looks very similar). All reimbursements made will be according to the tiered schedule on page 5.

There are four guiding principles of the Marketing Reimbursement Plan:

- Allows for any activity involving the Trusted Choice logo in external messaging with consumer impact for first time users, and for the use of Freedom Campaign materials for all members; and for an updated digital presence for all members
- The application must provide reasonable documentation that an expense was incurred and paid
- The nature of the expense is reasonably correlated to the external messaging and promotes the Trusted Choice brand to consumers.
- **The MRP will not reimburse ongoing expenses like website hosting/maintenance, directory listings, subscriptions to marketing services, expenses for yellow pages ads, or other phone book type advertising.**

2) Am I eligible?

The MRP is open only to agencies in good standing with Trusted Choice. Agencies that have multiple locations can apply for each location separately, however, materials submitted for reimbursement to be paid or credited to an agency's branch location must be shown to pertain to the branch location being credited with the expense. Items that pertain to multiple locations can be submitted on one application, with agency locations to be credited noted under "Additional comments."

There are limited funds available; therefore, Trusted Choice will offer reimbursements on a first-come first-served basis until funds allocated to the MRP are exhausted. Provided funds are still available, you have through February 2017 to submit materials invoiced in 2016.

3) How do I apply?

First, please review these guidelines. If you are unsure about an item or use of the logo, or want to get pre-approval of an item or proof prior to printing, email us at Trusted.Choice@iiaba.net. Then, fill out the application. Mail or email your application along with the required supporting materials.

Marketing Reimbursement Program

4) Which logo is reimbursable and where do I get it?

Only the Trusted Choice logo is eligible – the words “Trusted Choice” in the middle of the eagle swoosh:



You can choose either the stacked or horizontal version. Use of one of the three versions with the “Independent Insurance Agent” tagline is optional. Be sure to follow all the logo guidelines. Logo files can be downloaded from www.trustedchoice.com/logo. A link to the branding guidelines is located here: <http://bit.ly/1vFfsxH>

Note: The IIABA Association Logo is VERY similar (it also has an eagle swoosh and the same two colors), so be sure you are using the Trusted Choice logo.

5) Can I get MRP dollars for co-branding my website or mobile app?

The MRP will reimburse Trusted Choice agencies 50% of the invoice amount up to \$500 in total reimbursement for expenses incurred, and invoiced, in 2016 to update your agency’s digital presence to include Trusted Choice on your agency website, mobile/smartphone app, or social media.

To be eligible to receive reimbursement for your agency’s website it must incorporate the following three items:

The Trusted Choice logo: the logo can be used on any or all pages of the website.

Hyperlink to Trusted Choice: your agency website can link to any page on the Trusted Choice website; however, we have created a landing page specifically for this purpose. <https://www.trustedchoice.com/about-us/pledge-of-performance/> can be used to accomplish this requirement and this page does not include access to the agency locator.

The Pledge of Performance: the Pledge of Performance is our promise to consumers. To be eligible for reimbursement your site must contain the Pledge of Performance, a dedicated page for the Pledge, or a link to the Pledge on the Trusted Choice website.

To be eligible to receive reimbursement for your agency’s mobile app or social media, it must include the Trusted Choice logo.

In addition to having the required items on your website, mobile app, or social media, you must also participate in a website or social media checkup offered by Trusted Choice. For social media checkups please contact patrice.nickols@iiaba.net; and for website checkups please contact kiescha.cherry@iiaba.net.

Marketing Reimbursement Program

6) Can I get MRP dollars for co-branding promotional items?

The MRP will reimburse agencies 50% of the invoice amount of co-branded promotional items incurred, and invoiced, in 2016 to a maximum of \$250 total reimbursement. **This reimbursement will apply to new Trusted Choice members, or first time MRP users only.**

7) How do I use the FREE consumer content stream (RSS feed) on my website?

Although not a requirement for the MRP, you can also include an optional syndicated content feed for your website. Trusted Choice will automatically refresh content on your website if you choose to incorporate this feed. The articles contain topical insurance content that is seasonally appropriate and completely vetted for accuracy and readability. Once it is incorporated, there is nothing else you need to do.

To include this refreshed content, provide the following link to the feed to your webmaster or website vendor.

<http://www.trustedchoice.com/content.rss.xml>

Questions? For clarification, to request approval for additional items to be considered for reimbursement, or to send an advanced proof, please contact Trusted Choice at Trusted.Choice@iiaba.net or 1-800-221-7917.

Additional Details and Notes

The following information corresponds to the seven steps on pages 1 and 2, providing additional information and tips.

More about #1) Additional notes about the Marketing Reimbursement Program

The MRP was created with the goal of helping agencies co-brand with Trusted Choice. You may use the MRP for advertising and/or marketing materials including digital advertising. There are limited funds and applications are processed on a first come, first served basis.

More about #2) Eligibility

In addition to the requirements in bullet point 2, you may want to know how to find out if your agency has used your maximum allotment – or if your branches have applied. Contact Trusted Choice at Trusted.Choice@iiaba.net or 1-800-221-7917.

Marketing Reimbursement Program

More about #3) Applying for MRP

In order to be considered for reimbursement, a Trusted Choice Agency must submit to Trusted Choice the completed reimbursement request form located on page 6 of this document (or at www.trustedchoice.com/mrp), the approved design proof/sample/picture of the materials to be reimbursed, and an invoice or receipt showing proof of payment.

Trusted Choice reserves the right to deny any request for reimbursement that uses the Trusted Choice logo in a manner that is not consistent with the Trusted Choice Brand Style Guide or the guidelines of the MRP. Only the Trusted Choice logo is eligible for reimbursement from the MRP.

Applications are considered in the order they are received. Allow a minimum of 8 to 10 weeks for processing, but be aware that it may take longer depending on volume of applications received at any given time.

More about #4) The correct logo – the Trusted Choice logo

Only the Trusted Choice logo is eligible – the words “Trusted Choice” in the middle of the eagle swoosh. As with all uses of the Trusted Choice logo, materials produced under the MRP must use the Trusted Choice logo in a manner that is consistent with the guidelines set forth in the Trusted Choice Brand Style Guide (<http://bit.ly/1vFfsxH>).

As described in the Branding Style Guide, the only permissible colors of the logo are: all black, all Trusted Choice blue, black and Trusted Choice blue, all silver or all white (on a dark background).

The logo can be downloaded from www.trustedchoice.com/logo. Most vendors will request the .EPS version of the logo as it is a higher resolution and is easier for them to set up for your order. Please keep in mind that you will most likely not be able to open the .EPS files on your computer as it requires special software to do so; however vendors experienced in these services should have the needed software. You will need your username and password to gain access to the portion of the Trusted Choice website where the logo and logo rules are maintained if you want to download them for your vendor. We advise you to provide your vendor with the logo as well as the Trusted Choice Brand Style Guide to ensure that the logo is used correctly so that you can be reimbursed. If you do not have your username and password please email Trusted.Choice@iibaba.net with “Need Password” in the subject line so we can reply to your request.

More about #5) Logos and scripts for your web master when co-branding your website

Hyperlink to Trusted Choice: your agency website can link to any page on the Trusted Choice website; however, we have created a landing page specifically for this purpose. <https://www.trustedchoice.com/about-us/pledge-of-performance/> can be used to accomplish this requirement and this page does not include access to the agency locator.

Website logos:

Below you will find an example block to provide to your webmaster or web vendor to copy and paste into your website. This incorporates all three requirements listed above.

To use the horizontal version of the logo:

```
<a href="http://www.trustedchoice.com/pledgeofperformance.htm" ></a>
```

Marketing Reimbursement Program

To use the stacked version of the logo:

```
<a href="http://www.trustedchoice.com/pledgeofperformance.htm" ></a>
```

More about #6) Working with vendors to co-brand promotional items

We recommend that you send Trusted Choice® a design proof prior to any work being done to ensure that the logo is used correctly. **We reserve the right to deny reimbursement if the Trusted Choice logo is not used according to the Trusted Choice Signature Guide**

More about #7) RSS feed – what's the current month's content?

The feed pushes articles that are listed at:
<http://www.trustedchoice.com/content.rss.xml>

Tiered Reimbursement Schedule

There are 3 levels of reimbursement provided by the MRP in 2016, including a bonus for new members/first time MRP users.

Tier 1: The MRP will reimburse up to \$500 for use of any of the Freedom Campaign advertising materials provided at www.trustedchoice.com/agents. They can be found in the Filing Cabinet, in the Freedom Campaign folder, under the Advertising files. All agency locations will be reimbursed at 50% of the invoice amount, up to \$500 maximum reimbursement.

In addition to the Freedom Campaign materials reimbursement for tier 1, **new members and first time MRP users** will be able to be reimbursed up to an additional \$250 to co-brand the Trusted Choice logo on any consumer focused item. This includes promotional items, original advertising (non-Freedom campaign ads), or collateral items like business cards or stationery. Reimbursements will be 50% of the invoice amount, up to \$250 max reimbursement **for new members or first time MRP users only**.

Tier 2: All agency locations will be able to be reimbursed up to \$500 for a digital upgrade using a web developer/vendor. This will include updates to an agency's website, social media, or mobile app. These can be updated in conjunction with the website and social media checkups that are offered by Trusted Choice, and the checkup will be required prior to reimbursement. Website updates need to include the Trusted Choice logo, Pledge of Performance, and link to the Trusted Choice website. Social media and mobile app updates need to include the Trusted Choice logo. All Reimbursements will be made at 50% of the invoice amount, for expenses incurred specific to the update. Invoices for website hosting/maintenance are not acceptable for reimbursement.

Tier 3: Throughout 2016, Trusted Choice will offer agencies digital advertising/marketing services that will be managed by Trusted Choice. Any agency participating will receive up to a maximum \$500 for participation in Trusted Choice's local online advertising buys that allows your agency to purchase ads on websites/Facebook targeting consumers who need insurance. For more information on this tier please contact Kiescha Cherry at kiescha.cherry@iibaba.net.

All agency locations that takes advantage of all 3 tiers of reimbursement can be reimbursed to a maximum of \$1500 for calendar year 2016. New members or first time users of the MRP can be reimbursed up to an additional \$250 (see tier 1 above). All funds reimbursed are on a first come first served basis, including the tier 3 digital media subsidy, which may be discontinued if the budgeted funds are depleted.



Marketing Reimbursement Program

2016 Trusted Choice® Marketing Reimbursement Program (MRP) Application

PLEASE REVIEW THE GUIDELINES FOR REIMBURSEMENT, INCLUDING THE CHANGES FOR 2016 and COMPLETE ALL OF THE INFORMATION REQUESTED BELOW. TRUSTED CHOICE® WILL NOT CONSIDER ANY REIMBURSEMENT REQUEST WITHOUT ALL REQUIRED INFORMATION AND MATERIALS.

RETURN:

- ☐ THIS FORM, WITH ALL INFORMATION REQUESTED
- ☐ APPROVED DESIGN PROOFS FROM THE VENDOR or SAMPLE/PICTURE OF ITEMS
- ☐ COPY OF INVOICE or RECEIPT SHOWING PROOF OF PAYMENT (must be dated in 2016)

DATE: _____

AGENCY NAME: _____
(Please print clearly the exact name that should appear on the check, as it appears in Trusted Choice®)

MAILING ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

CONTACT: _____

PHONE: _____

EMAIL: _____

TOTAL AMOUNT SPENT: _____

REIMBURSEMENT AMOUNT SOUGHT: _____

FOR TIER 2 DIGITAL REIMBURSEMENT PLEASE PROVIDE APPLICABLE WEB ADDRESS: _____

Additional Comments:

Send in this completed form and all required supporting materials to:

Trusted Choice®, Inc.
Attention: MRP
127 South Peyton Street
Alexandria, VA 22314

Applications are processed in the order received. We accept applications for reimbursement through February 2017, provided invoices are dated in 2016 – and as long as funds allocated to the MRP have not been exhausted.