



Incentive & Promotion Guidelines

GENERAL INCENTIVE GUIDELINES

Requirements

- You must be a LegalShield Advantage subscriber throughout the entire incentive period.
- You must be in good standing with the company to qualify.
- From time to time, the Company may offer multiple opportunities to qualify for a trip or award. Associates that qualify in multiple categories or drawings are eligible for one trip/award per Agreement.
- If you have accepted an invitation to attend a corporate sponsored leadership and training event but later choose not to attend, the value of the activities will be added to your 1099 regardless of attendance if travel and accommodations have already been booked.

Incentive Program Announcements

- The initial documents announcing an incentive will generally reference these guidelines as well as additional qualification requirements.
- You must refer to the specific program document governing an incentive for complete details.
- Additional promotion of an incentive may not contain all the details that were originally announced with the program. Be aware of all incentive materials to ensure proper guidelines are followed during the incentive period.

Qualification Period

- Qualifying activity must be achieved within the designated qualification period.

Income Reporting

- Bonuses are reported as income on your Form 1099. Any items of value received through incentives or awards are also reported as income based on their fair market value at the time they are delivered.
- Cost associated with attending an incentive trip for you and a guest are generally treated as taxable income. This can include airfare, resort, meals, activities and gifts.
- Bonuses paid via commission adjustment will apply to any negative amount in your cash accrued.

Good Standing

- All associates must be in good standing with the company to receive incentives, including bonuses or trips. Any associate that is currently being sanctioned or on hold status will not be eligible.
- Each incentive requires retention metrics that can vary between personal and organizational retention. Refer to the individual incentive flier for full details.

Fair Play

- You will be disqualified from any incentive if you are found to have abused any aspect of the program, as determined solely by LegalShield.
- We may deny you the ability to participate in current or future incentive programs if there has been, or may have been, any manipulation, violation or abuse of the incentive program.

Modifications or Termination

- LegalShield reserves the right to suspend, modify or terminate an incentive at any time. Incentive trips are subject to availability and ability to hold the event. If an incentive trip must be cancelled for any reason, LegalShield is not required to provide a substitution prize or trip. Qualification criteria or awards may be changed in any manner or discontinued outright.

Recognition

- By participating in a LegalShield incentive, bonus program, or corporate-sponsored leadership and training event to receive benefits, cash and other awards, you agree to have your full name, associate title, level, standing and photo, published and recognized in LegalShield marketing materials.

Reinstatements

- Associates that have been out over three years and have paid the current associate fee are considered a new recruit for incentive purposes.
- Associates that have been out over three years and have paid the current associate fee will be eligible for the Fast Start bonus.
- Members that have been out over 5 years will count for the original writing agent, or 6 months for a new writing agent.
- No PC points will be issued for a member who reinstates and upgrades simultaneously.

Reviews

- Bonus and incentive payouts for associates are subject to a review period of up to 30 days from the date of submission.
- If you believe that you have been mistakenly excluded from an incentive program trip reward, you will have seven days to appeal once the qualifiers have been published. You will have 20 days to appeal all other incentive program awards. Appeals should be directed to: Associateintake@pplsi.com

PERFORMANCE CLUB

- For full program details, [click here](#).

PC Upline Matching Bonuses

- For full program details, [click here](#).

ASSOCIATE RESPONSIBILITY

Associate Fees

- You must have paid your associate fee and have an active membership to be eligible for an incentive program or award.
- Any membership or associate agreement that is not paid for by the named member or associate will be subject to review and may not count toward an incentive program.
- It's the associates responsibility to make sure a membership is linked with a new recruits

Daily Membership Deadlines

- Paper (uploaded) applications must be received by 11:59 a.m. CT.
- Online reinstatement applications must be received by 4:59 p.m. CT.
- New web applications through marketing sites, Associates Only Back Office (AOBO), and LegalShield@Work must be received by 11:59 p.m. CT.

Month End Deadlines

- Month end submissions are processed on the last working business day of the month.
- Paper, walk-in and all reinstatements will be accepted until 4:59 p.m. CT.
- New web applications through marketing sites, AOBO or LegalShield@Work will be accepted until 11:59 p.m. CT.

Group Business

- LegalShield may require the first payment on all new group memberships for business to count toward an incentive program or award. Refer to the specific incentive document for full details.

Dual Agreements

- If you and your spouse/domestic partner have separate associate agreements or are listed as a writing agent on a separate agreement, you may accumulate separate bonuses. However, for the purposes of qualifying for a corporate sponsored incentive travel event, only one trip per couple will be awarded.

Pre-Paid Credit Cards

- Prepaid cards are no longer accepted as a form of payment.

TRIPS AND TRAVEL

Eligible Travelers

- Qualifying incentive trip winners will generally receive a trip for two. If you would like to bring additional attendees, they must be booked by you and paid for at your own expense.

Covered Travel Expenses

- All accommodations are booked directly through a travel agency chosen by LegalShield.
- Travel will only be provided to the trip destination from within the United States and Canada.
- Independently booked accommodations for airfare and will be reimbursed at approved rates.
- Airfare reimbursement takes place after the trip, and once the required documentation is received by LegalShield.
- Air transportation and lodging are covered for qualifiers as outlined in the incentive program announcement.
- All other expenses, activities, and excursions not expressly outlined by the incentive program is your own responsibility and will not be reimbursed by LegalShield.
- Disorderly conduct during the trip may result in the forfeiture of the trip, future trips, and could lead to termination of your Associate Agreement.
- Any expenses incurred due to disorderly conduct will be your responsibility and won't be reimbursed by LegalShield.

Covered Travel Expenses (continued)

- If transportation to and from an incentive trip are booked by the invited associate, the associate will be reimbursed for the pre-approved amount. Any additional costs associated with the trip will be incurred by the associate.
- Each qualifying associate is entitled to one room. If you require additional rooms, you must reach out to the Home Office to check availability prior to booking your flights. If a room is available, you will be responsible for the cost.
- Guest Changes: If you change your guest after flights have been booked, the following will apply:
 - For nonrefundable flights, a flight credit will be issued in the guest's name for future use.
 - The qualifying associate will be taxed for the cost of that flight.
 - If the maximum flight allocation has been reached, the qualifying associate or their guest will be responsible for covering the flight cost.
- Bringing an associate who has not qualified for the incentive trip as your guest is discouraged unless the individual is your spouse or significant other. If you intend to bring a non-qualifying associate, you must obtain approval from the Home Office prior to booking. Trips booked without prior approval are subject to cancellation.
- You are responsible for obtaining a valid passport. Failure to have a valid passport or other identification for travel at the time of the registration deadline may result in forfeiture of the trip.

Inability to Attend

- The trip's value cannot be paid in cash in lieu of attendance.
- A substitution prize will not be given if you cannot attend a qualifying incentive trip, nor will you be allowed to assign the trip to someone else.
- If you are unable to attend the event for any reason, you will not be entitled to any additional award or enhanced benefit to which those in attendance may be entitled.

ADDITIONAL LIMITATIONS

- In addition to limiting those who have abused or been fraudulent with an incentive program, you may also be limited from future rewards and incentives if you experience a significant drop in personal or organizational retention or if you conduct yourself in an unacceptable way – including your behavior on incentive trips.

BROKERS & GENERAL AGENTS

- All Associates that are under a Business Solutions contract (General Agent, Broker) can only write Business Solutions premium. 100% of their premium is considered Business Solutions and counts toward the Business Solutions incentives. If a GA would like to be considered a Network associate, they can ask to be switched to a Network Contract, but then must qualify for Sr. Director and above each month.