2019 SALES LEADERS CONFERENCE IN PORTUGAL • JUNE 25–JULY 1, 2019

CONFERENCE QUALIFICATION PERIOD JANUARY 2, 2018–DECEMBER 31, 2018

SENIOR/INDIVIDUAL MARKETS

Bankers Fidelity®

2019 CONFERENCE QUALIFICATION REQUIREMENTS

Category	Production Requirement
Agent	$135,000.00
GA	$375,000.00
MGA	$550,000.00
RSD/Platinum Partners	$800,000.00
Partner Marketing Group	$2,000,000.00

Contract date between April 1 & June 30, 2018

Agent	$105,000.00
GA	$300,000.00
MGA	$430,000.00
RSD/Platinum Partners	$625,000.00
Partner Marketing Group	$1,500,000.00

Contract date after June 30, 2018

Agent	$85,000.00
GA	$250,000.00
MGA	$350,000.00
RSD/Platinum Partners	$500,000.00
Partner Marketing Group	$1,250,000.00

SENIOR/INDIVIDUAL MARKETS CREDIT AMOUNTS

Qualification is based on net submitted production during the qualification period (January 2, 2018–December 31, 2018). Policies must have an effective date no later than December 31, 2018 and must be active throughout the qualification period.

Open Enrollment/Guaranteed Issue	50%
STC, HIP, Cancer, DI & Accident	200%
Underwritten Medicare Supplement	100%
Life	150%

All conversions will be credited at 0%.
No credit will be given for Medicare Disability plans or any state mandated guarantee issue plans.

Bankers Fidelity reserves the right to withhold an invitation to the annual Sales Leaders Conference should any of the following performance criteria occur:

- Persistency drop below 70%
- Loss Ratio exceed 70%
- Underwritten business mix fall below 50%

SENIOR/INDIVIDUAL MARKETS

2018 PRODUCTION CLUB REQUIREMENTS • PRODUCTION CLUB PERIOD 1/1/2018–12/31/18

Based on net issued production

	Bronze	Silver	Gold	President's Club	Chairman's Club
Agent	$135,000	$150,000	$200,000	$250,000	Top 2 Ancillary Producers & Top 2 UW Med Supp Producers
GA	$375,000	$425,000	$550,000	$725,000	Top 1 Ancillary Producer & Top 1 UW Med Supp Producer
MGA	$550,000	$650,000	$850,000	$1,000,000	Top 1 Ancillary Producer & Top 1 UW Med Supp Producer
RSD/Platinum Partners	$800,000	$900,000	$1,000,000	$1,500,000	Top 1 Ancillary Producer & Top 1 UW Med Supp Producer
Partner Marketing Group	$2,000,000	$2,500,000	$3,500,000	$5,000,000	Top 1 Ancillary Producer & Top 1 UW Med Supp Producer

PALATIAL ACCOMMODATIONS AWAIT YOU IN PORTUGAL

PESTANA PALACE HOTEL LISBON

June 25–28, 2019

An expertly restored palace serves as the setting for a relaxing stay, enveloping you in the luxury and opulence of this historic city.

INTERCONTINENTAL PORTO–PALACIO DAS CARDOSAS

June 28–July 1, 2019

Classic meets contemporary in this lush retreat in the heart of the city. Porto's most famous attractions, as well as dining, shopping and an electric nightlife are only footsteps away.

PESTANA PORTO–A BRASILEIRA

June 28–July 1, 2019

Once home to an iconic coffee shop, this newly renovated hotel offers top-notch lodging and amenities while preserving the legacy of this integral part of the city's history.

JOIN US IN PORTUGAL IN 2019!

Bankers Fidelity®

2018 QUALIFICATION REQUIREMENTS

SENIOR/INDIVIDUAL MARKETS

BANKERS FIDELITY®
SALES LEADERS CONFERENCE
LISBON • PORTO • JUNE 25–JULY 1, 2019

GENERAL RULES AND ELIGIBILITY FOR THE 2019 SALES LEADERS CONFERENCE

- Final qualification for the Conference is determined by the Company and takes into consideration such factors as percentage of underwritten business, persistency, loss ratio, indebtedness to the Company and the business relationship between the qualifier and the Company.
- Qualifiers must be in compliance with all Company and state marketing rules and regulations and be in good standing with Bankers Fidelity Life Insurance Company®, Bankers Fidelity Assurance Company™ and its legal entities.
- The Company governs all rules and regulations of the Conference and may modify, alter or change any rules and/or regulations during the qualification period.
- The Company reserves the right to change the announced dates, destination or hotels.
- The Company and/or its authorized representatives are responsible for all Conference planning and arrangements, including airline ticketing.
- Due to the business purpose of the Conference, no cash equivalent payment will be made to any person who qualifies to attend the Conference but fails to do so for any reason.
- All qualifiers are invited to bring one guest.
- If any flight changes are made by the qualifier or their guest after they have confirmed and booked their flight itinerary, the qualifier will be responsible for any change or cancellation fees incurred. Qualifier agrees to pay by check or from their as-earned commission account where commissions can support the charge.
- Only qualifying Agents, General Agents, Managing General Agents, Regional Sales Directors, Platinum Partners and Partner Marketing Groups and their guest may attend.
- Agents and agencies can only qualify in one category, assigned by the Company, based on the compensation schedules in their signed contract.
- All performance criteria calculations are set by the Company.
- The company reserves the right to cap the number of qualifiers due to the exclusivity of the location and venue capacity maximums due to contractual agreements.
- No substitutions are permitted.
- All decisions of the Company are final.

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