



Trusted Choice[®] Marketing Reimbursement Program Guidelines

For 2011



Marketing Reimbursement Program

WHAT IS THE MARKETING REIMBURSEMENT PROGRAM?

A brand is more than an advertising campaign. A brand is a collection of images and ideas that convey the essence of a company. In order to build equity, a brand must be consistent in all points of contact and ever present in the minds of people. Building a solid and consistent brand experience is of the utmost importance to Trusted Choice®. To that end, Trusted Choice® is continuing the Marketing Reimbursement Program (MRP) for calendar year 2011. This program is designed to aid Trusted Choice® independent insurance agencies and brokerage firms in delivering the brand experience to their customers consistent with Trusted Choice®. Through the MRP, Trusted Choice® will reimburse a portion of expenses incurred **in 2011** by Trusted Choice® agencies in co-branding materials such as business cards, letterhead, envelopes, agency signage, logo-wear; and in creating or updating an online 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® logo** on these materials. **Reimbursement will only be made for the Trusted Choice® logo.**

WHAT ARE THE RULES?

A Trusted Choice® agency can be reimbursed up to \$500 in 2011 for including the Trusted Choice® logo on marketing materials and the agency's website.

For website:

The MRP will reimburse Trusted Choice® agencies up to \$250 incurred in 2011 for including Trusted Choice® on your agency website. Your agency's website must incorporate the following:

The Trusted Choice® logo: the logo can be used on any or all pages of the website. Logo files can be downloaded from www.trustedchoice.com/logo

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. <http://www.trustedchoice.com/pledgeofperformance.htm> 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 or a link to the Pledge on the Trusted Choice® website. Many agency websites do include a dedicated page to the Pledge, however, it is not required for reimbursement.

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:

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<a href="http://www.trustedchoice.com/pledgeofperformance.htm" ></a>
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To use the stacked version of the logo:

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<a href="http://www.trustedchoice.com/pledgeofperformance.htm" ></a>
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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 about once a month if you choose to incorporate this feed. The articles contain topical insurance content that is seasonally appropriate and completely vetted for accuracy and readability. Beyond including the script below there is nothing else you need to do – we do it all for you. To include this refreshed content, provide the script below to your webmaster or web vendor:

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<script language=javascript  
src="http://www.cevadopartners.com/lib/page\_emitter.php?page\_id=500"></script>
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For printing:

The MRP will reimburse Trusted Choice® agencies 50% of the invoice amount of co-branded items incurred in 2011 to a maximum of \$500 provided your agency has included the website requirements (above). This includes materials such as business cards, letterhead, envelopes, agency signage, logo-wear, among others, based on the list of Suggested Items (below) ordered from a Recommended Vendor (below) or a local vendor with approval from Trusted Choice®.

The MRP was created with the goal of helping agencies co-brand with Trusted Choice®. However; the MRP does not reimburse for any type of direct advertisement (radio, TV, print ads, yellow pages and billboard ads).

Even if your agency already has stationery and business cards with the Trusted Choice® logo and your website has the logo, the Pledge of Performance and the link for the Trusted Choice® website, your agency can still participate. A list of ideas can be found in the Suggested Items section (below). If your agency has already co-branded your website prior to 2011, your agency can be reimbursed up to \$500 for co-branded marketing materials.

WHO CAN PARTICIPATE?

The MRP is open only to agencies in good standing with Trusted Choice®. Agencies that have multiple locations can apply for each location separately.

There are limited funds available; therefore, Trusted Choice® will offer reimbursements on a first-come first-served basis until December 31, 2011 or until funds allocated to the MRP are exhausted.

WHAT ARE SUGGESTED ITEMS?

Following is a list of Suggested Items that will qualify for reimbursement under the MRP:

- Business Cards
- Letterhead
- Envelopes
- Sales Proposal Folders / Presentation Kits
- Outdoor Signage
- Pledge of Performance Plaque
- Logo Plaque
- Logo-wear (shirts, lapel pins, etc.)
- Pens/Pencils
- Calendars / Appointment Diaries
- ID card holders
- Tote bag
- Marketing brochures and/or postcards



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- Tent / Tradeshow booth
- Website Setup charge (up to \$250)

These are a few of the items that your agency could consider when taking advantage of the program; however there are many other items that can be found at the **API, Inc** website (www.apisource.com/trustedchoice) and the **Brown Dog Marketing** website (www.browndogmarketing.com)

If you have questions or suggestions regarding other items you would like to have considered for reimbursement under the MRP, please call us or send an email to Trusted.Choice@iibaba.net. Trusted Choice® cannot reimburse for any items not on the Suggested Items list above without prior approval. All Suggested Items must display the Trusted Choice® logo in accordance with the Trusted Choice® Signature Guide.

WHAT ARE THE RECOMMENDED VENDORS?

Below is a list of Recommended Vendors. When making a purchase, please let the Recommended Vendor know that you are seeking to participate in the Trusted Choice® MRP. These Recommended Vendors already have the appropriate Trusted Choice® logo files on file and are familiar with the acceptable use of the Trusted Choice® marks. Due to the local nature of the acquisition of outdoor signage, we have not designated any vendors for this need. For more detailed vendor information please visit www.trustedchoice.com/mrp. You may also choose to use your own vendor.

Printed Materials

- **Mines Press, Inc.** – 1-800-447-6788 (www.minespress.com)
- **Todd Allan Printing** – 301-982-0300 (www.toddallan.com)

Logo Items

- **API, Inc.** – 1-800-507-7007 (www.apisource.com/trustedchoice)
- **Brown Dog Marketing** - 609-799-5814 - (www.browndogmarketing.com)

Website Services

- **Artizan Internet Services** – 860-925-6020 (www.artizan.com)
- **Cevado Technologies** - 877-700-2519 (trustedchoice@cevado.com)



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WHERE CAN I GET THE LOGO ARTWORK?

The vendors listed above should have the appropriate Trusted Choice® logo artwork already, and the logo also 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 that if you are not using a Recommended Vendor, you should provide your vendor with the logo as well as the Trusted Choice® Signature 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.

HOW DO I APPLY?

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, the approved design proof or a sample of the materials to be reimbursed, and an invoice or receipt showing proof of payment.

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® Signature Guide (<http://na.iaaa.org/TrustedChoice2/Logos/TCLogoRules4-07.pdf>).

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® Signature Guide or the guidelines of the MRP.

WHO SHOULD I CONTACT WITH MY QUESTIONS?

If you have any questions, comments or concerns regarding the MRP, want to request approval for additional items to be considered for reimbursement, or want to suggest other vendors, please contact Trusted Choice at Trusted.Choice@iibaba.net or 1-800-221-7917.



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PLEASE 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 OF ITEMS**
- COPY OF INVOICE or RECEIPT SHOWING PROOF OF PAYMENT**

DATE: _____

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

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

CONTACT: _____

PHONE: _____

EMAIL: _____

TOTAL AMOUNT SPENT: _____

REIMBURSEMENT AMOUNT SOUGHT: _____

FOR WEBSITE REIMBURSEMENT PLEASE PROVIDE 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

Forms and materials received after December 31, 2011 or after funds allocated to the MRP-are exhausted will not be eligible for reimbursement.



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Marketing Reimbursement Program FAQs

1. How do I apply for MRP?

You will need to submit the MRP form located at www.trustedchoice.com/mrp, a copy of the paid invoice and a sample or proof of the item.

If you are applying for website reimbursement, you will need to submit the MRP form, a copy of the paid invoice and provide the website URL on the form.

2. Can I use a different vendor from the "Recommended list"?

While we would prefer agencies use the vendors we have vetted, we do understand that some agencies in their everyday business practices have existing relationships with local vendors. Those vendors will be allowed for use with the MRP as long as the logo is used according to the Signature Guide. Trusted Choice® will not reimburse for improper use of the logo.

3. If a local vendor is used, do I need to provide anything else besides the requested information?

If you choose to use your own vendor, we recommend that you send 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.**

4. Can my agency be reimbursed for items that are not listed on the MRP guidelines?

Yes, but you will need to request approval by sending an email to Trusted Choice® at Trusted.Choice@iiba.net.

5. Do I need to display any other information on my website besides the Trusted Choice® logo?

Yes, you will need to have the link for the Trusted Choice® website (www.TrustedChoice.com) and the Pledge of Performance or a link to the Pledge of Performance: (<http://www.trustedchoice.com/pledgeofperformance.htm>)

6. Can I get reimbursed for print, billboard, radio or TV advertising?

No. The MRP will only reimburse an agency that is co-branding materials such as business cards, letterhead, envelopes, agency signage, logo-wear, calendars, etc.; and in creating or updating an online presence, to include the Trusted Choice® logo and Pledge of Performance. Direct advertising is not acceptable for MRP reimbursement.

7. Can I get reimbursed for something else if my agency is already using the Trusted Choice® logo and the Pledge of Performance on its website, stationery and business cards?

Yes, your agency can get reimbursed for any other marketing items that include the Trusted Choice® logo that is not related directly with advertisement (print ads, yellow pages and billboards, etc.). If your agency has already co-branded its website prior to 2011 you can be reimbursed up to \$500 for marketing materials using the Trusted Choice® logo.

8. Can I get reimbursed for my Yellow Pages ads?

No. The MRP will not reimburse for yellow pages as it a direct advertising expenditure and is not eligible.