



Trusted Choice[®] Marketing Reimbursement Program Guidelines

For 2009



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 ever present and consistent in all points of contact 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 introducing the Marketing Reimbursement Program (MRP). This program is designed to aid Trusted Choice® independent insurance agencies and brokerage firms (TC Agency) 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 2009 by TC Agencies in rebranding materials such as business cards, letterhead, envelopes, agency signage, logo-wear and in creating an on-line presence, among others, to include the Trusted Choice® logo. This is not meant to replace your agency's logo, but to complement it by including the Trusted Choice® logo on these materials.

WHAT ARE THE RULES?

Trusted Choice® will reimburse TC Agencies 50% of the initial cost of branded items up to a maximum of \$250 incurred in 2009, based on the list of Acceptable Items (below) ordered from an Approved Vendor (below), with the exception that TC Agencies may choose any vendor for outdoor agency signage. Additionally, Trusted Choice® will reimburse up to \$250 incurred in 2009 to cover the initial setup fee for a TC Agency website. The maximum amount payable to any TC Agency under the MRP is \$500. The MRP is open only to TC Agencies in good standing with Trusted Choice® and can be used only once by any TC Agency. 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.

In order to be considered for reimbursement, a TC Agency must submit to Trusted Choice® the completed reimbursement request form located on page 4 of this document, the approved design proof for 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.iaa.org/TrustedChoice2/Logos/TCLogoRules4-07.pdf>). Trusted Choice® reserves the right to deny a request for reimbursement that uses any of the Trusted Choice® marks in a manner that is not consistent with the Trusted Choice® Signature Guide or the guidelines of the MRP.

WHAT ARE ACCEPTABLE ITEMS?

Below is a list of Acceptable Items that will qualify for reimbursement under the MRP. 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@ijaba.net. Trusted Choice® cannot reimburse for any items not on the Acceptable Items list below without prior written approval. All Acceptable Items must display the Trusted Choice® logo in accordance with the requirements set forth above.

- Business Cards
- Letterhead
- Envelopes
- Sales Proposal Folders/Presentation Kits
- Outdoor Signage
- Pledge of Performance Plaque
- Logo Plaque



Marketing Reimbursement Program

- Pledge of Performance Tent Cards
- Logo-wear (shirts, lapel pins, etc.)
- Pens/Pencils
- Website Setup charge (up to \$250)

WHAT ARE THE ACCEPTABLE VENDORS?

Below is a list of Acceptable Vendors. When making a purchase, please let the Acceptable Vendor know that you are seeking to participate in the Trusted Choice® MRP. These Acceptable 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 do not have designated any vendors for this need. For more detailed vendor information such as pricing, please visit <http://www.trustedchoice.com/agentbroker/coop.aspx>.

- Printed Materials
 - **Mines Press, Inc.** – 1-800-447-6788 (www.minespress.com)
The Mines Press, Inc. is the leading supplier of high quality stationery, presentation folders, brochures, business envelopes, forms, newsletters and calendars to the independent insurance industry. Established in 1933, three generations of the Mines family have been supplying the industry for well over 50 years. We have been a preferred vendor of IIABA since 1995 and Trusted Choice® since its inception. In addition to our diverse product line, we offer in-house design services and mailing and fulfillment services for your calendar distribution or direct marketing efforts. For inquiries, contact Linda Deluca or Steven Mines.
 - **Todd Allan Printing** – 301-982-0300 (www.toddallan.com)
Todd Allan is a modern, full-service, commercial sheet-fed printer that uses state-of-the-art digital and multicolor offset presses. In addition, we provide in-house design, bindery, mailing and fulfillment services to our clients.
- Logo Items
 - **API, Inc.** – 1-800-507-7007 (www.apisource.com/trustedchoice)
API offers over 500,000 items, from gifts to apparel - polo shirts, denim shirts, umbrellas, license plate frames, coffee mugs, key chains, window decals, pens and more -- all prominently displaying the Trusted Choice®.
 - **Brown Dog Marketing** - 609-799-5814 - (www.browndogmarketing.com)
Brown Dog Marketing is a leading supplier of corporate gifts, promotional products, screen printing and embroidering and is now ranked in the top 8-10% of promotional product distributors in the United States. Brown Dog Marketing prides itself on customer service, quality products and competitive pricing. Feel free to contact owner Jim D'Ovidio or Stacy McIntire, who oversees in house operations, with any questions.
- Website Services
 - **Artizan Internet Services** – 860-925-6020 (www.artizan.com)
Artizan Internet Services brings a unique combination of technology innovation and insurance expertise to focus on assisting insurance professionals to better service their customers and manage their business more efficiently. Our stability and resources lead the insurance industry in customer care solutions.
 - **Cevado Technologies** - 877-700-2519 (trustedchoice@cevado.com)
Cevado Technologies provides web services for thousands of clients in the



Marketing Reimbursement Program

small business, non-profit, real estate, insurance and author industry. The company began in 1996 as a one-person custom website design service, creating the tradition of individual and personal service that continues today for every website we create.

- o **Web Solutions of America** – 407-998-5593 (www.wsoaonline.com)
Web Solutions of America is an Orlando Florida web design firm. We are a full-service web site design company that specializes in web design, custom web development, custom logo design, web hosting, search engine optimization (SEO), internet marketing , and e-commerce solutions for small and large businesses. We can help define and build a targeted internet strategy that is specific to your business and web site.

WHERE CAN I GET THE LOGO ARTWORK?

The vendors listed above should have the appropriate Trusted Choice® logo artwork already, and it 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 rules are maintained if you want to download them, and if you do not have your username and password please email Trusted.Choice@iiaba.net with "Need Password" in the subject line so we can reply to your request.

WHO SHOULD I CONTACT WITH MY QUESTIONS?

If you have any questions, comments or concerns regarding the MRP, want to request approval on for additional items to be considered for reimbursement, or want to suggest other vendors, please contact us using the information below:

Trusted Choice®, Inc.
Attention: Ines Hoyle (ines.hoyle@iiaba.net)
127 South Peyton Street
Alexandria, VA 22314
1.800.221.7917 x5418



Marketing Reimbursement Program

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**
- AND INVOICES/RECEIPTS 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: _____

Additional Comments:

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

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

Forms and materials received after December 31, 2009 or after funds allocated to the MRP will be exhausted not be eligible for reimbursement.