

# FSI Marketing Assistance Program Guidelines

## How It Works

The First Sierra Insurance Services marketing assistance program is designed to help provide agents with funds to be used towards their current marketing campaigns. The funds should be applied through approved vendors by individually producing agents contracted through First Sierra Insurance Services, LLC. MGA's and GA's are not eligible for this program.

Quarterly **qualified and issued** Medicare Supplement, and Medicare Advantage plans will receive reimbursement of up to the following amounts:

| Level       | # Qualified Issued Apps in a Quarter  | Reimbursement Funds   |
|-------------|---|---|
| Quick Start | For NEW agents  | <ul style="list-style-type: none"> <li>➤ Free list of 100 T65 names (one list per contract)</li> </ul>  |
| Level 1     | 20-49 Apps<br>Per calendar quarter<br>Jan / Feb / Mar; April / May / June<br>July / Aug / Sept; Oct / Nov / Dec | <ul style="list-style-type: none"> <li>➤ Up to \$500 toward a 2,000-piece mailer from Target Leads mailing vendor.</li> <li>➤ The agent is responsible for all remaining cost.</li> </ul> |
| Level 2     | 50-75 Apps<br>Per calendar quarter<br>Jan / Feb / Mar; April / May / June<br>July / Aug / Sept; Oct / Nov / Dec | <ul style="list-style-type: none"> <li>➤ 50% or up to \$1500 total spent on reimbursement of an approved marketing project.</li> </ul>  |
| Level 3     | 76-99 Apps<br>Per calendar quarter<br>Jan / Feb / Mar; April / May / June<br>July / Aug / Sept; Oct / Nov / Dec | <ul style="list-style-type: none"> <li>➤ 50% or up to \$2500 total spent on reimbursement of an approved marketing project.</li> </ul>  |
| Level 4     | 100+<br>Per calendar quarter<br>Jan / Feb / Mar; April / May / June<br>July / Aug / Sept; Oct / Nov / Dec       | <ul style="list-style-type: none"> <li>➤ 50% or up to \$3500 total spent on reimbursement of an approved marketing project.</li> </ul>  |

## AEP – Annual Election Period

Qualifying applications collected for AEP **DO NOT** count towards your quarterly numbers. Below is our bonus marketing assistance for AEP Medicare Advantage production.

| # Of Issued Medicare Advantage Apps | Reimbursement of Marketing Funds   |
|-------------------------------------|--|
| 20-49 Apps                          | ➤ 50% or up to \$500 total spent on reimbursement of an approved marketing project.  |
| 50-99 Apps                          | ➤ 50% or up to \$1000 total spent on reimbursement of an approved marketing project. |
| 100+ Apps                           | ➤ 50% or up to \$1500 total spent on reimbursement of an approved marketing project. |

**Target Leads Information-** *reference Steve Kultz & First Sierra Insurance Services, LLC.*

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## Terms and Conditions

**Qualifying plans:** Issued Medicare Advantage and Medicare Supplement plans, except for High-Deductible F and K plans and Pre-65 issued Medicare Supplement plans. Please double check your applications to be sure that they all qualify. If we provide you funds based on invalid or ineligible application(s), we reserve the right to request reimbursement from you.

## Level Specifics

**Quick Start-** This provides a free list of 100 T-65 names (one per contract). You can request the names from FSI, and the names will be sent to you via email. You must request your list(s) by submitting the Quick Start Request form via fax (877) 315-3099 or via secure upload at [www.myseniorsales.com](http://www.myseniorsales.com), within 90 days of initial contracting and certification.

**Level 1-** Qualifying for this level requires the production of 20-49 apps during a calendar quarter.

Level 1 provides \$500 credit toward a 2,000-piece mailer from the Target Leads mailing program. The agent is responsible for the remaining costs. Credited marketing funds expire within 90 days of qualification quarter.

You must request reimbursement before completing your order with Target Leads.

**Level 2, 3, 4-** The qualifications and assistance amount for these levels are as follows:

- Level 2 provides up to \$1500 for 50-75 qualified apps per calendar quarter.
- Level 3 provides up to \$2500 for 76-99 qualified apps per calendar quarter.
- Level 4 provides up to \$3000 for 100+ qualified apps per calendar quarter.

**Agents will receive a check for up to the level maximums that will cover 50% of their total spend.**

| Approved Use of Marketing Funds | Not Approved Use of Marketing Funds |
|---------------------------------|-------------------------------------|
| Internet Leads                  | Licensing Fees                      |
| Direct Mail                     | Meals                               |
| List Vendors                    | Clothing                            |
| Newspaper & Print Ads           | Telephone                           |
| TV & Radio Ads                  | Office Expenses                     |
| Social Media Ads                | Office Supplies                     |
| Seminar Expenses                | Personal Items                      |
| Promotional Items               |                                     |

*Listed above are examples, but not limited to in either column.*

Any custom mailing pieces or promotional items purchased using funds from this marketing assistance program must be submitted for **approval from FSI for compliance before use**. If you are unsure if a vendor would be approved, please contact FSI for clarification before placing your order. Expenses must be Medicare-related and funds can only be used for one type of marketing expense per quarter.

**Agents are responsible for application tracking, completion, and submission of required Production Verification and Reimbursement request forms for program participation.**

To request reimbursement:

1. Verify your production
2. Place your order with the vendor
3. Fax (877)315-3099 or electronically upload ([www.myseniorsales.com](http://www.myseniorsales.com)) receipts/invoices (showing total spend, vendor name, date invoice was paid and what was purchased), Production Verification and completed Reimbursement Request form.

All forms can be found on our agent website [www.myseniorsales.com](http://www.myseniorsales.com).