

# 2023 Trusted Choice® Marketing Reimbursement Program (MRP)

## GUIDELINES

Trusted Choice will reimburse a portion of expenses incurred in 2023 by Big “I” members for co-branding advertising and marketing materials or making certain digital improvements for your agency.

### Reimbursement Allotment

All agencies are eligible for up to a \$1000 reimbursement for co-branded marketing and certain digital improvements. This is a 50% match base on one allotment per member agency (limited to one location). Funds will replenish for all members in 2024.

### Ways to Qualify

- **Co-branding:** Use of the Trusted Choice logo on consumer facing advertising. For access to pre-produced advertising materials visit our [Marketing Campaigns](#) that can be customized for your agency free of charge by Trusted Choice staff. There are print, digital, video and radio ads available.
  - **Digital Co-branding:** Use of any of the Trusted Choice customizable marketing materials or brand creative that includes the Trusted Choice logo. This includes video production and advertising costs (display ads, social media ads, YouTube etc.)
  - **Traditional Co-branding:** Certain traditional advertising options are eligible for reimbursement (billboards, radio, print, client incentives, and some sponsorships), provided they are co-branded with the Trusted Choice logo. **Stationary, business cards and other office supplies are NOT eligible for reimbursement.** We encourage you to seek guidance from a Trusted Choice staff member with questions regarding eligibility via [trusted.choice@iiaba.net](mailto:trusted.choice@iiaba.net)
- **TechCompare Vendor Services:** Reimbursement is available to make strategic digital improvements and incorporate additional services within your agency using one of the providers designated as MRP eligible listed on our vendor comparison site

www.TechCompare.IndependentAgent.com. You can utilize the funds with one or multiple vendors during the year up to the \$1,000 limit. You must be a new customer as of 2023 to be eligible for funds. **Contract renewals do not qualify.**

### **Guiding Principles of the Marketing Reimbursement Program**

- The program allows for any eligible activity involving the Trusted Choice logo in external messaging with consumer impact for members, and for an updated digital presence for members.
- The application must provide reasonable documentation that an expense was incurred and paid.
- All reimbursements are 50% of the amount spent to the maximum of \$1000 reimbursement. To qualify for the full \$1000 reimbursement, the member must provide documentation that \$2000 was spent.
- Applications for reimbursement can be made all at once, or as expenses are incurred. In no case will a member be reimbursed more than \$1000.
- The nature of the expense is reasonably correlated to the external messaging and promotes the Trusted Choice brand to consumers or qualifies for digital improvements by a preferred vendor.
- Reimbursement for a website requires that the Trusted Choice logo be displayed on the website's home page.
- Only expenses and invoices incurred in 2023 are eligible for reimbursement.

The MRP will not reimburse ongoing expenses like directory listing, expenses for phone-book type advertising or website hosting/maintenance outside of our preferred vendors.

### **Important Application Information**

To apply for reimbursement, a member must submit to Trusted Choice:

- A completed reimbursement form. Applications can be [submitted on our website](#) or emailed to [Trusted.Choice@iiaba.net](mailto:Trusted.Choice@iiaba.net).
- For applications requesting reimbursement for co-branding, a design proof/sample/picture of each of the materials to be reimbursed (please send in color.)
- For applications requesting reimbursement for digital improvements, invoices or receipts showing proof of payment are required. Please include a description of the work that was done.
- To receive expedited reimbursement via direct deposit, members must set up an account with bill.com – an email will be sent once your application has been processed with step-by-step guidance. This must be completed within 48 hours of receiving email.



- All other payments will be made via mailed check. Please note, this will delay the payment date.

Applications are considered in the order in which they are received until available MRP funds have been depleted. A submitted application is not a guarantee of reimbursement. Applications will be accepted through February 2024, however the program may close sooner at Trusted Choice's sole discretion. Please allow up to 8 weeks for processing.

**Trusted Choice reserves the right to deny any request for reimbursement for any reason including use of the Trusted Choice logo in a manner that is not consistent with the Trusted Choice Brand Style Guide or the guidelines of the MRP. Only the Trusted Choice logo is eligible for reimbursement. If you are unsure about an item or use of the logo, want to get pre-approval of an item, or need to check if your agency is eligible for any reimbursement, please contact us at [Trusted.Choice@iiba.net](mailto:Trusted.Choice@iiba.net) or call (800) 221.7917.**