



2024 Trusted Choice® Marketing Reimbursement Program (MRP)

GUIDELINES

Trusted Choice will reimburse a portion of expenses incurred in 2024 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 based on one allotment per member agency (limited to one location.)

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 customized digital marketing materials from Trusted Choice or any digital marketing materials created by another entity that include the Trusted Choice logo. Funds can be used towards production (when paid) or towards cost of ad placement. (Display ads, paid social media ads, YouTube, streaming apps, 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. Stationery, 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@iiba.net
- **TechCompare Vendor Services:** This reimbursement is available to enhance your agencies marketing and technology capabilities. Leverage any MRP eligible vendors on the [TechCompare](#) platform as a new customer. Check for eligible vendors here:
<https://TechCompare.IndependentAgent.com>
 - You can utilize the funds with one or multiple vendors during the year. This is limited to \$500 per TechCompare vendor. **You must be a new customer as of 2024** to be eligible for funds. Contract renewals do not qualify.
 - Agencies who utilize program funds to work with a TechCompare vendor are required to **leave a review** of their experience on the platform within 6 months of being reimbursed.
 - [How to Leave a TechCompare Review - Trusted Choice \(independentagent.com\)](#)

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 or \$500 for vendors. To qualify for the full \$1000 reimbursement, the member must provide documentation that \$2000+ was spent. For vendor reimbursement, as there is a maximum of \$500 per vendor, you would submit \$1000+ for a maximum reimbursement.
- 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 2024 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. We prefer applications be [submitted on our website](#) but they can also be emailed to Trusted.Choice@iiaba.net.
- A completed W-9 form if one is not on file.
- 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.
- If you would like to receive electronic payment via direct deposit, please open the email you will receive from bill.com in 3-5 business days after submitting your application. Complete the steps outlined in the email to submit banking information. Otherwise, payments will be made by check. All checks must be cashed within 90 days.
- 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 2025, however the program may close sooner at Trusted Choice's sole discretion. Once your application is complete, please allow 4-6 weeks for processing.

Trusted Choice reserves the right to deny any request for reimbursement for any reason, including the 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@iaba.net or call (800) 221.7917.