



2021 Trusted Choice® Marketing Reimbursement Program (MRP) Guidelines

Trusted Choice will reimburse a portion of expenses incurred **in 2021** by Big "I" members for cobranding advertising and marketing materials. This is not meant to replace your agency's brand, but to complement it by including the **Trusted Choice** branding in your marketing efforts.

Levels of Reimbursement

There are 3 levels of reimbursement provided by the MRP in 2021:

Option 1: Up to \$750 for use of the Trusted Choice logo on consumer-focused items. All eligible agency locations will be reimbursed 50% of total invoice. Option 1a is max value of \$750 per agency, option 1b is max value of \$750 per agency location.

- **1a.: Cobranding with Trusted Choice - Digital Marketing Focused – *Open to all members (INCLUDING those that have used MRP before)**
Use of any of the Trusted Choice customizable campaigns or custom campaign by member that includes the Trusted Choice logo. This includes video production, advertising costs (Display ads, social ads, YouTube, etc.)
- **1b: Cobranding with Trusted Choice - Available for new members and first time MRP users only.**
Use of the Trusted Choice logo on any consumer-focused items. This includes, but is not limited to, Trusted Choice ad materials, promotional items, original advertising (non-Freedom campaign ads), signage, or collateral items like business cards or stationery.

*Marketing efforts must take place in calendar year 2021 to be eligible. These funds will most likely not be made available again in 2022.

For Trusted Choice ad materials go to: <https://cobrand.iiaba.net/made-for-you>. Trusted Choice ad materials can be customized free of charge by Trusted Choice and returned to you ready for your vendor. There are print, digital, video, and radio ads that can be customized.

Option 2: Digital Upgrade - Available to all member agencies. (One per agency).

- \$500 for signing up to use a preferred digital vendor for your agency's website.
 - Current preferred vendor includes:
 - ITC, Forge3 ActiveAgency, Titan Web, Advisor Evolved and Marketing 360
 - This is a flat reimbursement of \$500.
 - Website must have been built 2021.
 - Website must include Trusted Choice logo on homepage
 - Each provider does bill differently. You must have spent at least \$500 before applying for reimbursement with proof of payment.

Option 3: TrustedChoice.com Advantage Subscription – Available to NEW Advantage subscribers only

- Reimbursement of \$125 when purchasing any annual subscription ([full details of Advantage subscription here](#)).
- "New" is defined as not having been an Advantage subscriber within the previous 24 months.

Guiding principles of the Marketing Reimbursement Plan:

- 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 all members.
- The application must provide reasonable documentation that an expense was incurred and paid.
- The nature of the expense is reasonably correlated to the external messaging and promotes the Trusted Choice brand to consumers.
- **The MRP will not reimburse ongoing expenses like directory listings, subscriptions to marketing services, expenses for yellow pages ads, website hosting/maintenance outside of preferred vendors or other phone book type advertising.**

Application Information:

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

- Completed reimbursement application form. Applications can be submitted on the Trusted Choice member website at <https://cobrand.iiaba.net/money>, mailed to the address on the form, or emailed to Trusted.Choice@iiaba.net.
- Option 1 - The approved design proof/sample/picture of each of the materials to be reimbursed (in color if possible).
- Option 2 (web upgrade) - Invoice(s) **or** receipt(s) showing proof of payment are required. Please also include the agency' website on the application form.
- Option 3 (Advantage subscription) - Please provide proof of payment to trustedchoice.com for an annual Advantage subscription

All invoices must be dated in 2021. Applications are considered in the order they are received. Allow a minimum of 8 to 10 weeks for processing, but be aware that it may take longer depending on volume of applications received at any given time. **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 Brand Style Guide or the guidelines of the MRP. Only the Trusted Choice logo is eligible for reimbursement from the MRP**

If you are unsure about an item or use of the logo, want to get pre-approval of an item or proof prior to printing, or need to check if your agency or branch locations are eligible for any reimbursement, email us at Trusted.Choice@iiaba.net or call 800.221.7917.

**2021 Trusted Choice®
Marketing Reimbursement Program (MRP) Application**

PLEASE REVIEW THE GUIDELINES FOR REIMBURSEMENT, INCLUDING THE CHANGES FOR 2021 and COMPLETE ALL OF THE INFORMATION REQUESTED BELOW. TRUSTED CHOICE WILL NOT CONSIDER ANY REIMBURSEMENT REQUEST WITHOUT ALL REQUIRED INFORMATION AND MATERIALS.

RETURN:

D THIS FORM, WITH ALL INFORMATION REQUESTED

D APPROVED DESIGN PROOFS FROM THE VENDOR or SAMPLE/PICTURE OF ITEMS (Option 1)

D COPY OF INVOICE or RECEIPT SHOWING PROOF OF PAYMENT (must be dated in 2021)

DATE: _____

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

MAILING ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

CONTACT: _____

PHONE: _____

EMAIL: _____

TOTAL AMOUNT SPENT: _____

REIMBURSEMENT AMOUNT SOUGHT: _____

FOR OPTION 2 DIGITAL REIMBURSEMENT PLEASE PROVIDE APPLICABLE WEB ADDRESS
AND WEB PROVIDER

ADDRESS: _____

PROVIDER: _____

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**

OR BY EMAIL TO:
Trusted.Choice@iiaba.net

OR APPLY DIGITALLY AT:
<https://cobrand.iiaba.net/money>

Applications are processed in the order received. **Allow a minimum of 8 to 10 weeks for processing, but be aware that it may take longer depending on volume of applications received at any given time.**

We accept applications for reimbursement through February 2022, provided invoices are dated in 2021 and if funds allocated to the MRP have not been exhausted.