



# 2014 Trusted Choice<sup>®</sup> Marketing Reimbursement Program (MRP) Guidelines

The following eight bullet points give an overview of the program. For additional details, links, scripts and/or notes for each of these points, refer the Additional Details and Notes section on page 3.

## 1) What is the Marketing Reimbursement Program?

In order to deliver the brand experience to your customers consistent with Trusted Choice<sup>®</sup>, Trusted Choice<sup>®</sup> will reimburse a portion of expenses, up to \$1,600, incurred **in 2014** by Trusted Choice<sup>®</sup> agencies in co-branding materials such as advertising, business cards, letterhead, envelopes, agency signage and logo-wear; and in creating or updating a digital presence to include the Trusted Choice<sup>®</sup> logo, link to the Trusted Choice<sup>®</sup> website and Pledge of Performance. This is not meant to replace your agency's brand, but to complement it by including the **Trusted Choice<sup>®</sup> logo** on these materials. **Reimbursement will only be made for use of the Trusted Choice<sup>®</sup> logo...**(not the IIABA association logo, which looks very similar). All reimbursements made will be according to the tiered schedule on page 5.

There are four guiding principles of the Marketing Reimbursement Plan:

- Allows for any activity involving the Trusted Choice<sup>®</sup> logo in external messaging with consumer impact
- 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<sup>®</sup> brand to consumers..
- **The MRP will not reimburse ongoing expenses like website hosting/maintenance, directory listings or subscriptions to marketing services.**

## 2) Am I eligible?

The MRP is open only to agencies in good standing with Trusted Choice<sup>®</sup>. Agencies that have multiple locations can apply for each location separately, however, materials submitted for reimbursement to be paid or credited to an agency's branch location must be shown to pertain to the branch location being credited with the expense.

There are limited funds available; therefore, Trusted Choice<sup>®</sup> will offer reimbursements on a first-come first-served basis until funds allocated to the MRP are exhausted. Provided funds are still available, you have through January 2015 to submit materials invoiced in 2014.

## 3) How do I apply?

First, please review these guidelines. If you are unsure about an item or use of the logo, or want to get pre-approval of an item or proof prior to printing, email us at [Trusted.Choice@iiaba.net](mailto:Trusted.Choice@iiaba.net). Then, fill out the application. Mail or email your application along with the required supporting materials.



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## Marketing Reimbursement Program

### 4) Which logo is reimbursable and where do I get it?

Only the Trusted Choice® logo is eligible – the words “Trusted Choice” in the middle of the eagle swoosh:



You can choose either the stacked or horizontal version. Use of one of the two “Independent Insurance Agent” taglines is optional. Be sure you follow all the logo guidelines. Logo files can be downloaded from [www.trustedchoice.com/logo](http://www.trustedchoice.com/logo). A link to the logo guidelines is at the bottom of that page.

Note: The IIABA Association Logo is VERY similar (it also has an eagle swoosh and the same two colors), so be sure you are using the right one.

### 5) Can I get MRP dollars for co-branding my website or mobile app?

The MRP will reimburse Trusted Choice® agencies 50% of the invoice amount up to \$500 in total for expenses incurred, and invoiced, in 2014 for including Trusted Choice® on your agency website or mobile/smartphone app.

To be eligible to receive reimbursement for your agency’s website it must incorporate the following three items:

**The Trusted Choice® logo:** the logo can be used on any or all pages of the website.

**Hyperlink to Trusted Choice®:** your agency website can link to any page on the Trusted Choice® website; however, we have created a landing page specifically for this purpose. <http://www.trustedchoice.com/pledgeofperformance.htm> can be used to accomplish this requirement and this page does not include access to the agency locator.

**The Pledge of Performance:** the Pledge of Performance is our promise to consumers. To be eligible for reimbursement your site must contain the Pledge of Performance, a dedicated page for the Pledge, or a link to the Pledge on the Trusted Choice® website.

To be eligible to receive reimbursement for your agency’s mobile app, it must include the Trusted Choice® logo.

### 6) Can I get MRP dollars for co-branding promotional items?

The MRP will reimburse Trusted Choice® agencies 50% of the invoice amount of co-branded promotional items incurred, and invoiced, in 2014 to a maximum of \$500.

### 7) How do I use the FREE consumer content stream (RSS feed) on my website?

Although not a requirement for the MRP, you can also include an optional syndicated content feed for your website. Trusted Choice® will automatically refresh content on your website if you choose to incorporate this feed. The articles contain topical insurance content that is seasonally appropriate and completely vetted for accuracy and readability. Once it is incorporated, there is nothing else you need to do.

To include this refreshed content, ask your webmaster or web vendor to contact Kevin Brandt at [Kevin.Brandt@iiaba.net](mailto:Kevin.Brandt@iiaba.net).



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## Marketing Reimbursement Program

**Questions?** For clarification, to request approval for additional items to be considered for reimbursement, or to send an advanced proof, please contact Trusted Choice® at [Trusted.Choice@iibaba.net](mailto:Trusted.Choice@iibaba.net) or 1-800-221-7917.

## Additional Details and Notes

The following information corresponds to the eight steps on pages 1 and 2, providing additional information and tips.

### More about #1) Additional notes about the Marketing Reimbursement Program

The MRP was created with the goal of helping agencies co-brand with Trusted Choice®. You may use the MRP for advertising and/or marketing materials including digital advertising.

Even if your agency already has stationery and business cards with the Trusted Choice® logo and your website has the logo, the Pledge of Performance and the link for the Trusted Choice® website, your agency can still participate as you produce other promotional items or advertising with the Trusted Choice® logo.

### More about #2) Eligibility

In addition to the requirements in bullet point 2, you may want to know how to find out if your agency has used your maximum allotment – or if your branches have applied. Contact Trusted Choice® at [Trusted.Choice@iibaba.net](mailto:Trusted.Choice@iibaba.net) or 1-800-221-7917.

### More about #3) Applying for MRP

In order to be considered for reimbursement, a Trusted Choice® Agency must submit to Trusted Choice® the completed reimbursement request form located on page 6 of this document (or at [www.trustedchoice.com/mrp](http://www.trustedchoice.com/mrp)), the approved design proof/sample/picture of the materials to be reimbursed/website URL, and an invoice or receipt showing proof of payment.

**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® Signature Guide or the guidelines of the MRP.**

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.



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## Marketing Reimbursement Program

### More about #4) The correct logo – the Trusted Choice® logo

Only the Trusted Choice® logo is eligible – the words “Trusted Choice” in the middle of the eagle swoosh. 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.iaaa.org/TrustedChoice2/Logos/TCLogoRules4-07.pdf>).

As described in the Signature Guide, the only permissible colors of the logo are: all black, all Trusted Choice® blue, black and Trusted Choice® blue, all silver or all white (on a dark background).

The logo can be downloaded from [www.trustedchoice.com/logo](http://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 and logo rules are maintained if you want to download them for your vendor. We advise you to provide your vendor with the logo as well as the Trusted Choice® Signature Guide to ensure that the logo is used correctly so that you can be reimbursed. If you do not have your username and password please email [Trusted.Choice@ijaba.net](mailto:Trusted.Choice@ijaba.net) with “Need Password” in the subject line so we can reply to your request.

### More about #5) Logos and scripts for your web master when co-branding your website

**Hyperlink to Trusted Choice®:** your agency website can link to any page on the Trusted Choice® website; however, we have created a landing page specifically for this purpose. <http://www.trustedchoice.com/pledgeofperformance.htm> can be used to accomplish this requirement and this page does not include access to the agency locator.

Website logos:

Below you will find an example block to provide to your webmaster or web vendor to copy and paste into your website. This incorporates all three requirements listed above.

**To use the horizontal version of the logo:**

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<a href="http://www.trustedchoice.com/pledgeofperformance.htm" ></a>
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**To use the stacked version of the logo:**

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<a href="http://www.trustedchoice.com/pledgeofperformance.htm" ></a>
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### More about #6) Working with vendors to co-brand promotional items

We recommend that you send Trusted Choice® a design proof prior to any work being done to ensure that the logo is used correctly. **We reserve the right to deny reimbursement if the Trusted Choice® logo is not used according to the Trusted Choice® Signature Guide**

### More about #7) RSS feed – what’s the current month’s content?

The feed pushes articles that are listed at  
<http://www.trustedchoice.com/content.rss.xml>

. To see a member website containing RSS feed, go to: <http://afsinsurance.com/articles.php>



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## Marketing Reimbursement Program

### Tiered Reimbursement Schedule

In addition to the Tier 1 reimbursement provided by the MRP in previous years, in the 2014 MRP there will be additional options for your agency to be reimbursed as described below:

**Tier 1:**

The MRP will reimburse 50% of your total spent on allowable expenses to a maximum of \$500.

**Tier 2:**

In addition to the \$500 as part of Tier 1, you are eligible for an additional \$350 reimbursement if your agency uses the advertising materials provided by Trusted Choice (located at [www.trustedchoice.com/agents](http://www.trustedchoice.com/agents) - in the "2014 – Current Campaign" folder of the file cabinet). To be eligible for Tier 2, the cost of the media for which these ads are used must be at least \$350 and the MRP will not reimburse an agency for more than what was spent.

**Tier 3:**

Throughout 2014, Trusted Choice will purchase large blocks of wholesale digital media on websites focused on "in-market" consumers. Any agency wishing to purchase units of this media may do so at a cost of \$2,250. Each unit is valued at \$3,000 and will deliver approximately 600,000 consumer impressions. The MRP provides a subsidy of \$750 to lower your cost to \$2,250. The banner ads will be provided by Trusted Choice and customized with your agency's information and will be targeted to your specific market. Trusted Choice will manage all tagging, placement and tracking on your behalf. The digital ads will link to either your website or your agency profile on TrustedChoice.com. For more information on this tier please contact [Kiescha.Cherry@iibaba.net](mailto:Kiescha.Cherry@iibaba.net).

An agency taking full advantage of all 3 tiers can be reimbursed to a maximum of \$1,600 per calendar year. However, any agency may purchase 2 or more Tier 3 units of advertising at the full cost of \$3,000. The wholesale digital media subsidy is provided on a "first-come, first-serve" basis and may be discontinued if the budgeted funds are depleted.



**Marketing Reimbursement Program**

**2014 Trusted Choice®  
Marketing Reimbursement Program (MRP) Application**

**PLEASE REVIEW THE GUIDELINES FOR REIMBURSEMENT, INCLUDING THE CHANGES FOR 2014\*. THEN 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 or SAMPLE OF ITEMS
- COPY OF INVOICE or RECEIPT SHOWING PROOF OF PAYMENT (must be dated in 2014)

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 WEBSITE REIMBURSEMENT PLEASE PROVIDE WEB ADDRESS: \_\_\_\_\_

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**

Applications are processed in the order received. We accept applications for reimbursement through January 2015, provided invoices are dated 2014 - as long as funds allocated to the MRP have not been exhausted.