

## 2026 Trusted Choice® Marketing Reimbursement Program (MRP)

### GUIDELINES

Trusted Choice will reimburse a portion of expenses incurred in 2026 by Big “I” members for services from vendors listed on TechCompare, digital marketing efforts, and marketing education.

#### Reimbursement Allotment

All agencies are eligible for up to \$1000 in reimbursement. Reimbursement amount is calculated at 50% of cost to member agency with a maximum reimbursement of \$1000 (limited to one location.)

#### Ways to Qualify

- **Digital Marketing Efforts:** Digital marketing efforts executed by member agency in calendar year 2026 highlighting your agency and/or independent agents. Funds can be used towards production of digital materials (when paid) or towards cost of ad placements. Eligible efforts include but are not limited to: online display and banner ads, paid social media ads, PPC ads, ads on streaming services like YouTube and Hulu, digital sponsorships, ads within apps, graphic designer costs for email and logo development, radio and TV ads, and more. Subscriptions and recurring payments are not eligible.
- **TechCompare Vendor Services:** This reimbursement is available to enhance your agencies marketing and technology capabilities. Leverage any MRP eligible vendors on the [TechCompare](https://TechCompare.IndependentAgent.com) platform.. 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 a max \$500 per TechCompare vendor. **You must be a current customer and can only apply for reimbursement once per vendor.**
  - 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](#)
- **Marketing Education:** Funds may also be used for marketing education courses ,marketing conference registrations, marketing trainings, and marketing certifications. Paid webinars also eligible. Trusted Choice recommends courses covering general marketing, social media marketing, small business marketing, SEO, ai, design and more. All courses/conferences must be approved by Trusted Choice to confirm eligibility. **College tuition and Big “I” state events NOT eligible.** Must be primarily marketing focused – contact [Trusted.Choice@iiba.net](mailto:Trusted.Choice@iiba.net) to confirm eligibility.

- 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.
- Only expenses and invoices incurred in 2026 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. Printed materials like letterhead, business cards and store signage are not eligible.

### **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](mailto:Trusted.Choice@iiaba.net).
- A completed W-9 form if one is not on file.
- For applications requesting reimbursement for digital marketing or marketing education, invoices or receipts showing proof of payment are required. Please include a copy of marketing effort or link to description of marketing course. Vendor reimbursement requires paid invoices – unpaid invoices are not accepted.
- 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 2027, however the program may close sooner at Trusted Choice's sole discretion. Once your application is complete, please allow 4 weeks for processing.

**Trusted Choice reserves the right to deny any request for reimbursement for any reason. If you are unsure if a marketing effort or course is eligible or if your agency is eligible for any reimbursement, please contact us at [Trusted.Choice@iiaba.net](mailto:Trusted.Choice@iiaba.net) or call (800) 221.7917.**