

# Rules and restrictions for Allstate Agency Loyalty Program

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The following rules and restrictions apply to the Insperity Agency Loyalty Program.

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Insperity encourages you to provide referrals of small to medium size businesses or other agencies who may benefit from Insperity's products and services. Referrals to Insperity should be submitted at [insperity.com/agencyloyalty](https://insperity.com/agencyloyalty). Insperity will provide you or your agency with one or more "loyalty payments" for your referrals and for referrals who become Insperity clients, subject to the specific rules set forth below."

## **\$100 Loyalty Payment**

For you to be eligible for a \$100 loyalty payment, the referred company (i) must not be a current Insperity® client or customer of any kind; and (ii) must have an initial meeting with an Insperity Business Performance Advisor/Sales Solutions Specialist and a Company Leader of the referred company within 60 days after receipt of the referral in our system. A "Company Leader" is a C-level executive (CEO, CFO, COO), president, or a member of the referred company's board of directors.

## **\$250 loyalty payment**

To be eligible for a \$250 loyalty payment, the referred company must be an Allstate agency and become a new Insperity Workforce Optimization client with fewer than 5 full-time employees and complete its first payroll with Insperity Workforce Optimization. Referrals for any individual Insperity business performance solution, Workforce Acceleration solution, or any other Insperity bundled service offering are not eligible for the \$250 payment.

## **\$500 loyalty payment**

**Agency Referral.** If another Allstate agency is being referred, to be eligible for a \$500 loyalty payment, the referred company must become a new Insperity Workforce Optimization client with 5-9 full-time employees and complete its first payroll with Workforce Optimization. Referrals for any individual Insperity business performance solution, Workforce Acceleration solution, or any other Insperity bundled service offering are not eligible for the \$500 payment.

**Non-Agency Referral.** If a non-agency commercial business is being referred, to be eligible for a \$500 loyalty payment, the referred company must become a new Insperity Workforce Optimization or Workforce Acceleration client with 5-9 full-time employees and complete its first payroll with Workforce Optimization or Workforce Acceleration. Referrals for any individual Insperity business performance solution, or any other Insperity bundled service offering are not eligible for the \$500 payment.

## **\$2,000 loyalty payment**

**Agency Referral.** If another Allstate agency is being referred, to be eligible for the \$2,000 loyalty payment, the referred company must become a new Insperity Workforce Optimization client with 10 or more full-time employees and complete its first payroll with Insperity Workforce Optimization. Referrals for any individual Insperity business performance solution, Workforce Acceleration solution, or any other Insperity bundled service offering are not eligible for the \$2,000 payment.

**Non-Agency Referral.** If a non-agency commercial business is being referred, to be eligible for a \$2,000 loyalty payment, the referred company must become a new Insperty Workforce Optimization or Workforce Acceleration client with 10 or more full-time employees and complete its first payroll with Workforce Optimization or Workforce Acceleration. Referrals for any individual Insperty business performance solution, or any other Insperty bundled service offering are not eligible for the \$2,000 payment.

### **Additional promotional loyalty payments**

Insperty may offer additional promotional loyalty payments from time to time in its sole discretion. The terms and conditions contained in the materials for such promotional offerings shall apply in addition to or in lieu of the terms contained herein.

The terms contained in such promotional offering shall control over the terms contained herein in the event of a conflict.

### **Payments of loyalty payments**

Loyalty payments may only be paid to one person or entity. Payments may not be split among multiple payees. Referrals that are eligible for payments under Insperty Channel Agreements or any other similar agreement that compensates a person or entity for a referral, are not eligible for payments under the Agency Loyalty Program.

Please allow about a month from the time the eligibility for the award is triggered, to receive payment. Loyalty payments may be made by an Insperty-issued check or by any other method chosen by Insperty. Loyalty payments are considered taxable payments made for qualified referrals under the Insperty Loyalty Program and will be reported via an IRS Form 1099-MISC where required by IRS regulations. All tax obligations related to such loyalty payments are the sole responsibility of the person or entity receiving funds under the Insperty Agency Loyalty Program.

### **Additional charitable donation**

In addition to the loyalty payment as noted above, Insperty will make a charitable donation to a charitable organization for which the person making the referral is an employee, volunteer, or member of such charitable organization's board of directors ("Your Charitable Organization"). If you earned a \$100 loyalty payment for an initial meeting, Insperty will make a \$100 donation to Your Charitable Organization. If you earned a \$250 loyalty payment for referring a Workforce Optimization client, Insperty will make a \$125 donation to Your Charitable Organization. If you earned a \$500 loyalty payment for referring a Workforce Optimization client, Insperty will make a \$250 donation to Your Charitable Organization. If you earned a \$2,000 or more loyalty payment for referring a Workforce Optimization client, Insperty will make a \$1,000 donation to Your Charitable Organization.

To be eligible, Your Charitable Organization must be a non-profit and tax-exempt charitable organization as described in Section 501(c) (3) or 170(c) of the Internal Revenue Code and must furnish information requested by Insperty concerning evidence of its tax-exempt status before the charitable donation will be paid. Additionally, Insperty reserves the right in its sole discretion to refuse to make contributions to non-profits that it deems controversial or that it deems not in Insperty's best interest.

### **Changes to these rules and restrictions**

Insperty reserves the right to change the eligibility requirements or any other term of this Insperty Agency Loyalty Program at any time without notice. Insperty may discontinue the Insperty Agency Loyalty Program at any time in its sole discretion. These rules and restrictions were last updated on October 26, 2018.