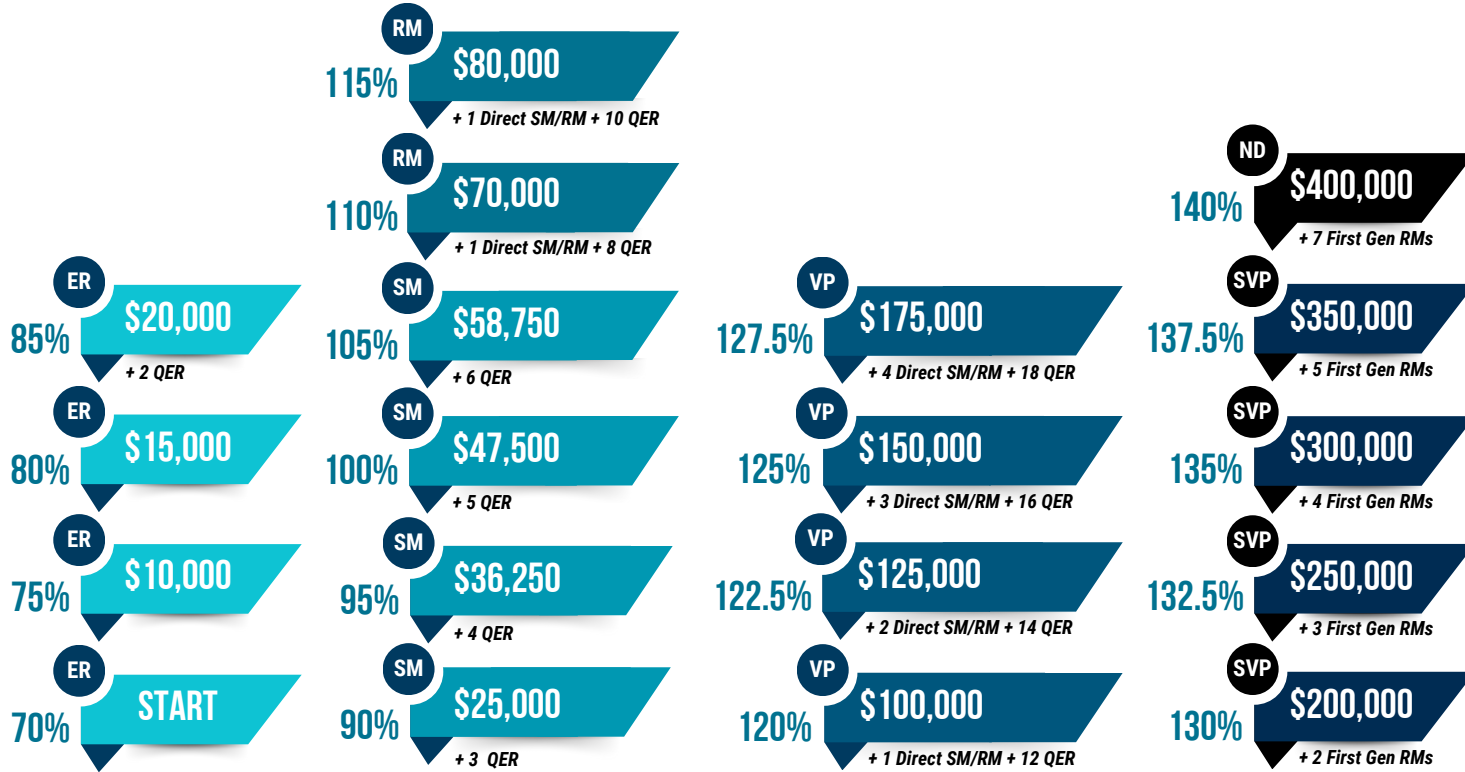


# BUILDING YOUR EQUIS BUSINESS (1/2)

BUILDER TRACK



PRODUCER TRACK



**PROMOTION QUALIFICATIONS:**

- **Promotion Qualification Period:** All levels before the 110% level have a qualification period of 1 month. At the 110% level and above, the qualification period is 2 consecutive months.
- **Manager Promotion Re-qualification Period:** To re-qualify for a Sales Manager (SM) and above level, guidelines must be met at least 2 non-consecutive months out of each 6-month period (January – June and July – December).
- **Placement and Persistency:** Must maintain company-acceptable placement and persistency.
- **50% Rule:** During promotion or bonus calculations, no more than 50% of the paid production value may come from any leg in the downline.
- **Qualified Equis Representative (QER):** An agent that has issued paid 3 bonusable applications. The direct manager may also be counted as a QER if these qualifications are met.
- **Paid Bonusable APV:** Paid production that meets bonus guidelines; excludes unreported, controlled, and guaranteed issue business, Foresters Your Term, LSW Term, and health, pet, children's and accidental policies (subject to change).
- **Maximum Credits On Each Application:** 5% up to a \$5,000 maximum credit per annuity application and up to \$5,000 maximum credit per life application.
- **Must maintain good standing with the company to qualify for a promotion.**

*\*Promotion and bonus qualifications are subject to change at any time.*

## BUILDER BONUS

140%	ND	= \$50,000
137.5%	SVP	= \$35,000
135%	SVP	= \$30,000
132.5%	SVP	= \$25,000
130%	SVP	= \$20,000
127.5%	VP	= \$12,500
125%	VP	= \$10,000
122.5%	VP	= \$7,500
120%	VP	= \$5,000
115%	RM	= \$2,500
110%	RM	= \$2,000
105%	SM	= \$1,500
100%	SM	= \$1,250
95%	SM	= \$1,000
90%	SM	= \$750

## GOLD STANDARD BONUS

\$2,500

## PRODUCER BONUS

\$60,000 +	= \$5,000
\$50,000 - \$59,999	= \$3,500
\$40,000 - \$49,999	= \$2,500
\$30,000 - \$39,999	= \$1,500
\$20,000 - \$29,999	= \$1,000
\$15,000 - \$19,999	= \$350
\$10,000 - \$14,999	= \$250

### BONUS QUALIFICATIONS:

- To qualify for a bonus at any **Regional Manager (RM)** level and above, the minimum RM qualifications at the 110% level must be achieved for that current month.
- To count any **Sales Manager (SM)/RM** in the SM/RM metric for the **Regional Manager** bonus, that SM/RM must be direct and have met the minimum qualification of their title during that current month.
- **Credit earned for each downline RM's baseshop production in an RM's hierarchy is calculated as follows:** RM: 100%; 1st Generation (direct): 75%; 2nd Generation: 50%; 3rd Generation +: 25%.
- For an unqualified downline RM's production to roll up to their upline RM, the upline RM must have a minimum of \$50k bonusable APV and 4 QERs.
- **Gold Standard Metrics:** 1. \$20k bonusable premium, personal production, 2. 10+ A-Lead Campaigns in LeadCENTER, 3. 3 direct, qualified Sales Managers that are qualified that current month.  
**A-Lead Campaign requirement increases at each level:**  
110% - 10 | 115% - 11 | 120% - 12 | 122.5% - 13  
125% - 14 | 127.5% - 15 | 130% - 20 | 132.5% - 25  
135% - 30 | 137.5% - 35 | 140% - No requirement
- **Must maintain good standing with the company to receive a monthly bonus.**

*\*Promotion and bonus qualifications are subject to change at any time.*