



# PROVIDER INCENTIVE PROGRAM 2024 RULES AND REGULATIONS

## Quarterly Qualifiers Cash Bonus

Received and issued business worth at least \$7,500 in FIRST QUARTER...	Cash Bonus equal to 7.5% of first quarter fees for each TASC service sold.
Received and issued business worth at least \$7,500 in SECOND QUARTER...	Cash Bonus equal to 7.5% of second quarter fees and any preceding qualifying quarter fees for each TASC service sold.
Received and issued business worth at least \$7,500 in THIRD QUARTER...	Cash Bonus equal to 7.5% of third quarter fees and any preceding qualifying quarter fees for each TASC service sold.
Received and issued business worth at least \$7,500 in FOURTH QUARTER...	Cash Bonus equal to 7.5% of fourth quarter fees and any preceding qualifying quarter fees for each TASC service sold.

## Quarterly Qualifiers Cash Bonus Example

	Q1	Q2	Q3	Q4	Total Production
Production Levels	\$7,500	\$7,500	\$7,500	\$7,500	\$30,000
Production Cumulative	\$7,500	\$15,000	\$22,500	\$30,000	\$30,000
Bonus Percentage	7.5	7.5	7.5	7.5	
<b>Bonus Cumulative</b>	<b>\$562.50</b>	<b>\$1,125.00</b>	<b>\$1,687.50</b>	<b>\$2,250.00</b>	<b>\$5,625.00</b>

## Non-Cash Awards – Sales Convention and Incentive Trip

Received and issued business worth \$6,000 in 2024.	One TASC-imprinted gift item (selected by TASC).
Top 20 producing Individual Group Providers in 2024.	A 5-day/4-night trip for two adults to TASC’s Annual Convention at a luxury resort. To qualify, Provider must have a minimum of received and issued group service offerings business worth \$30,000 in 2024. All Providers producing a minimum of received and issued group service offerings business worth \$50,000 are guaranteed the trip. At the \$80,000 level the Provider will earn one (1) additional trip from the same office (attendee must be actively engaged in the business).
Top 30 Agency Group Providers in 2024.	A 5-day/4-night trip for two adults to TASC’s Annual Convention at a luxury resort. To qualify, Provider must have a minimum of received and issued group service offerings business worth \$40,000 in 2024. All Providers producing a minimum of received and issued group service offerings business worth \$75,000 are guaranteed the trip. At the \$150,000 level the Provider will earn one (1) additional trip from the same office (attendee must be actively engaged in the business).

## Promotional Period

- Qualifying business must be received and issued between the first business day through noon of the last business day of the specific promotion period. For the year-end promotional period, December 31, 2024, will be the last business day (for the purpose of production, incentives, etc.).



- All business written during the promotion period must remain on the TASC books through 60 days after the close of the promotion period.
- TASC has full authority to determine qualifying business.

### Group Provider Definition

- An Individual Group Provider is defined as an entity with only one sales/producer role within the entity.
- An Agency Group Provider is defined as an entity with two or more sales/producer roles within the entity (includes satellite providers, regional stand-alone offices and sales roles who may or may not be contracted with TASC).

### Production Value

- For the purposes of PIP 2024, business will be assigned a production value as determined by TASC. The production value will be locked down and measured 60 days from the date of sale.
  - Production value for all Universal Benefit Account and COBRA Service sales equals 2.0 times the declared value of the first-year administrative fees.
  - Production value for all other TASC sales will equal 1.0 times the declared value of the first-year administrative fees.
  - HSA value to be \$4 per participant per month. Applies to the incentive trip only.
- TASC reserves the right to reduce the production value for any business that does not persist for 365 days from the issue date.
- Blocks of business brought to TASC as part of a takeover and/or acquisition do not count toward earning additional commission, prizes, or conventions through the TASC 2024 Provider Incentive Program, unless contractually agreed upon.
- For more information regarding Provider compensation and/or TASC fees, refer to page two of the Provider Agreement and/or the Providers' Fee and Commission Schedule.

### Awards

- Provider must have a valid contract with TASC concurrent to receiving the award.
- Other TASC programs may affect the number of Providers who qualify for the Convention. The number of Providers who qualify for the 2024 TASC Convention Award under the standard PIP rules and regulations may impact and even reduce the number of qualifiers from other TASC programs.
- Award items are chosen by TASC.
- All awards except the Convention will be sent no sooner than 60 days and no later 90 days after the promotion period in which they are achieved. The Convention will be awarded in April/May 2025.
- Qualifiers for the Convention include Provider and spouse or a companion age 18 or older.
- Official PIP invitations are sent on or around February 1, 2025 and are non-transferable.
- The top 20 percent of qualifying Group are considered Super Qualifiers, and earn an additional day stay at the TASC Convention location.
- TASC follows all IRS tax guidelines regarding awards.

**NOTE:** TASC Provider Incentive Program rules and regulations are subject to change. TASC reserves the right to adjust at any time and without advance communication the various credit factors upon which the Program is based. This communication is for illustrative purposes only. Actual earnings may vary.