



## LegalShield BMW Program Guidelines

### **Program Description**

The LegalShield BMW Program is an incentive program offered to independent sales associates who achieve and maintain membership in the Performance Club for twelve consecutive months. Independent sales associates who qualify for this program, purchase or lease a qualifying BMW, and properly notify LegalShield will qualify to receive a \$500 monthly Performance Club bonus. Sales associates retain the option of receiving a \$300 monthly cash Performance Club bonus in lieu of participating in the LegalShield BMW Program.

The LegalShield BMW Program is an incentive program designed to reward associates who continually and consistently produce a quality book of business.

### **Qualification**

In order to participate in the LegalShield BMW Program and receive the monthly \$500 Performance Club bonus, you must meet the following requirements.

- Twelve (12) consecutive months of Performance Club qualification and maintain the stated company average persistency.
- Lease or purchase a 2000 model year or newer BMW. The recommended “LegalShield BMW” is a white BMW 328i; however, any 2000 model year or newer BMW will qualify.
- Before the first \$500 bonus can be paid LegalShield must receive a copy of the title or purchase/lease contract verifying your ownership or lease of a qualifying BMW.
- Annually thereafter, on the anniversary of your first \$500 Performance Club bonus payment, you will provide LegalShield with a copy of the title or contract for the BMW in your name, an updated registration in your name and a recent photograph of you with your BMW.

### **Welcome Package**

When you qualify to participate in the LegalShield BMW Program, you will receive an official welcome package via email and/or regular mail from LegalShield.

#### **Your welcome package will include:**

- An Official Welcome Letter.
  - This letter will be your official invitation to participate in LegalShield BMW program.

*Corporate Offices: One Pre-Paid Way • Ada, Oklahoma 74820 • P: 580-436-1234*

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- Program Guidelines
  - The Program Guidelines provide the details and procedures of the LegalShield BMW Program. You will be required to read and review this document carefully before signing the attached Acknowledgment page. The Acknowledgment page must be signed and returned to LegalShield before the associate will be eligible to participate in the program.

You are not authorized to participate in the LegalShield BMW Program until you have received your Welcome Letter, reviewed the Program Guidelines and returned to LegalShield a signed copy of the Acknowledgment form. Please fax signed Acknowledgement form to (580) 436-7528 attention BMW Program.

### **Acquiring your BMW**

The recommended “LegalShield BMW” is a white BMW 328i.

Through the Vehicle Advantage benefit of the Associate Benefits Plan, LegalShield has secured the services of a vehicle advisor who is available to assist the qualifying associate with the lease/purchase process and, based upon the creditworthiness of the associate, obtain the most favorable leasing/purchasing terms available. If you wish to utilize the benefits of Vehicle Advantage please do so before directly contacting a dealership or seller.

However, since you are ultimately responsible for negotiating the terms of any deal and for any payments required by the lease/purchase of a qualifying BMW, you may work with a dealer or seller of your choice.

### **Qualifying BMW's:**

- Any model BMW 2000 model year or newer.
- Pre-owned BMW models qualify provided that they are model year 2000 or newer.
- BMW motorcycles will not qualify to receive the \$500 monthly Performance Club bonus.
- Exceptions may be considered for collector/vintage BMW's. Please contact LegalShield for consideration.

You have the option to either purchase or lease a qualifying BMW.

- There is no requirement as to length of lease or length of purchase financing.
- Purchasing a qualifying BMW will make the associate eligible for the \$500 monthly Performance Club bonus provided that you maintain ownership of the vehicle.
- Leasing a qualifying BMW will make the associate eligible for the \$500 monthly Performance Club bonus for the length of the lease. If the lease expires and the associate does not purchase the qualifying BMW or lease/purchase another qualifying BMW, you will no longer be eligible for the \$500 monthly bonus.

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## **Marketing & Promotion**

When you receive your LegalShield BMW, please provide a picture of you and your new BMW along with a brief testimony so that we can feature you on the Performance Club website.

Please provide the following after acquiring a qualifying BMW:

- A digital picture of you and your new LegalShield BMW. A high resolution JPEG is recommended.
- A short testimony about your journey to acquiring the LegalShield BMW.
- Please include your name and associate number.
- Please send pictures and testimonials to [performanceclub@legalshieldcorp.com](mailto:performanceclub@legalshieldcorp.com) or contact Associate Services at (580) 436-7424 for additional submission instructions.

Delivery of your LegalShield BMW to a local business briefing or a company sponsored national event will be supported and encouraged. Please coordinate details with your dealership and the local meeting holder.

## **IMPORTANT PROGRAM INFORMATION**

- The lease/purchase agreement you sign will be between you and the dealership/bank/financial institution. LegalShield's responsibility is to award you a monthly Performance Club bonus based on program rules and regulations.
- The \$500 Performance Club bonus will only be paid if and when you meet the qualification requirements, take delivery of your LegalShield BMW and sign and return all required documentation.
- LegalShield does not and will not offer advice regarding your current or future ability to honor a lease or purchase contract. Please contact an accountant, financial advisor or your provider attorney if you are unsure about your ability to honor the terms of a lease or purchase contract. The agreement to lease or purchase is strictly between you and the seller/lessor.
- The decision to acquire a new or used BMW is solely the responsibility of the independent sales associate. Any contract signed by the associate is exclusively between said associate and BMW, dealer, seller or lessor. LegalShield will not guarantee any purchase or lease payments and cannot offer any advice as to the associate's ability to finance a qualifying BMW.

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## **Performance Club Bonus Payments**

### **BMW Program bonus payments**

- The \$500 monthly BMW bonus is payable for as long as you maintain possession of a qualifying BMW, submit annual proof of possession, sustain Performance Club qualification and maintain the stated company average persistency.
- With the submission of the required Proof of Possession and the return of the signed Acknowledgement page you will become eligible for the \$500 monthly BMW bonus.
- Please fax documentation to (580) 436-7528 attention BMW Program or email to [performanceclub@legalshieldcorp.com](mailto:performanceclub@legalshieldcorp.com).
- Bonuses will be paid monthly on or around the 7<sup>th</sup> of the month.
- All required documentation must be received by the last day of the month in order for the \$500 BMW bonus payment to pay on or around the 7<sup>th</sup> of the following month. For, example you must have all documentation submitted and approved by May 31 if you expect to begin receiving the \$500 BMW bonus in June.

### **Cash or Non-BMW Bonus Payments**

If you do not wish to purchase or lease a qualifying BMW, LegalShield offers a \$300 cash bonus option for those associates who otherwise qualify to participate.

- The cash or non-BMW bonus payment is a monthly \$300 cash bonus. You are eligible for this bonus as long as you continue to qualify for Performance Club membership and maintain the stated company average persistency.
- No correspondence or documentation is necessary to receive this bonus.
- If you are/were receiving a cash bonus in excess of \$300 prior to the creation of the LegalShield BMW Program and you do not participate in the BMW Program you will be allowed to maintain your current bonus payment as long as you continue to meet the Performance Club qualification requirements.
- Bonuses will be paid monthly on or around the 7<sup>th</sup> of the month.

## **Proof of Possession**

Annually, on the anniversary of your first \$500 BMW bonus payment, you will be required to provide LegalShield Proof of Possession of a qualifying BMW as follows.

- Title or lease/purchase contract for a qualifying BMW in your name
- Updated registration in your name
- A recent photograph of you with your BMW

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- Please fax documentation to (580) 436-7528 attention BMW Program or email to [performanceclub@legalshieldcorp.com](mailto:performanceclub@legalshieldcorp.com).

### **Termination of BMW Bonus**

You will no longer be eligible to receive the \$500 BMW Bonus in the event of any of the following situations.

- You no longer own or lease a qualifying BMW.
- You fail to provide the required annual Proof of Possession.
- You sell your LegalShield associate agreement or if your agreement is otherwise terminated.
- You are found to be in violation of any of the Policies and Procedures of the associate agreement, you fail to Performance Club qualify or if your persistency rates fall below the stated company average.

### **BMW Requirements Checklist**

In order to become eligible and begin receiving the \$500 BMW bonus payment LegalShield will need to receive the following documentation.

- 1. First of all, you must Performance Club qualify for twelve consecutive months and maintain the stated company average persistency rate.**
- 2. You must submit a signed Acknowledgement letter.**
- 3. You must submit proof of your lease/purchase of a qualifying BMW.**
- 4. Continuing payments require your consistent Performance Club qualification, a retention rate that remains above the stated company average and submission of the annual Proof of Possession.**

Please fax documentation to (580) 436-7528 attention BMW Program or email to [performanceclub@legalshieldcorp.com](mailto:performanceclub@legalshieldcorp.com).



**Acknowledgment**

The undersigned LegalShield Independent Sales Associate (“Participant”) is eligible to participate in the LegalShield BMW Program, as described in the attached Program Guidelines. Participant acknowledges and agrees that he/she has received the Program Guidelines and by signing below, Participant further acknowledges and agrees as follows:

1. Participant’s purchase or lease of a qualifying BMW (in accordance with the terms and conditions of the Program Guidelines) is a condition for Participant’s receipt of the \$500 BMW bonus payments described in the Program Guidelines. In the event Participant does not purchase or lease a qualifying BMW in accordance with the terms and conditions of the Program Guidelines, Participant shall not be entitled to receive the \$500 BMW bonus payments described in the Program Guidelines. In addition, in the event that Participant does purchase or lease a qualifying BMW, but Participant’s purchase or lease agreement terminates for any reason or Participant fails to comply with any other requirements described in the Program Guidelines, Participant’s right to receive the \$500 BMW bonus payments will automatically terminate.

2. Participant understands that Participant is not obligated to purchase or lease a qualifying BMW. If Participant does purchase or lease a qualifying BMW, Participant acknowledges that he/she will, at all times, be personally and solely responsible for the payment of all purchase or lease amounts and/or any other amounts relating to such purchase or lease of a qualifying BMW. Participant further understands that LegalShield will not: (a) participate in any negotiations regarding Participant’s purchase or lease of a qualifying BMW; (b) sign the purchase or lease agreement, or any other documents, relating to Participant’s purchase or lease of a qualifying BMW; or (c) be liable in any way whatsoever for any financial or other obligations relating to Participant’s purchase or lease of a qualifying BMW. LegalShield’s only obligation with respect to Participant’s purchase or lease of a qualifying BMW will be to pay Participant’s \$500 bonus directly to Participant in such amounts, at such times and for such periods as described in the Program Guidelines and the Performance Club qualification criteria.

3. Participant releases LegalShield from any and all liability, risk or obligation related to his/her purchase or lease of a BMW, the BMW Program and/or the Performance Club Program.

4. Participant has read and fully understands the meaning and consequences of the Program Guidelines and this Acknowledgment and has consulted with Participant’s legal and tax advisors regarding any questions Participant has with respect to the Program Guidelines, this Acknowledgment and/or economic, legal and tax consequences of this Program.

Name: \_\_\_\_\_

Associate No: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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The undersigned is a family member, spouse or partner (“Partner”) of the above signed LegalShield Independent Sales Associate (“Participant”) and is a member of Participant’s household. Partner has agreed to acquire in his/her own name a qualifying BMW or has agreed to guarantee payments on behalf of above signed Participant who has acquired a qualifying BMW and by signing below acknowledges and agrees as follows:

1. I am a family member, spouse or partner of the above signed LegalShield Independent Sales Associate and together with Participant reside in the same household. I have reviewed, understand and agree to the above Program Guidelines.

2. Although I have agreed to acquire in my name or guarantee the contract of a qualifying BMW on behalf of Participant, I understand that I am not entitled to receive any bonus payments from LegalShield and by acquiring a qualifying BMW or guaranteeing payments for a qualifying BMW, I am solely responsible for all terms and conditions of the contract between myself and seller.

3. I understand that should Participant cease using the acquired qualifying BMW for any reason whatsoever that said Participant’s BMW bonus payments from LegalShield will be subject to immediate cessation.

Name: \_\_\_\_\_

Associate No: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_