

# Concierge Program



## DETAILS AND RULES

With Legacy Marketing Group®, you already have access to unmatched service, some of the best new business turnaround times available, and the [LegacyNet®](#) one-stop shop agent portal to manage all your new and inforce business. With at least \$2 million in annual paid premium, you can qualify for elevated Platinum- or Diamond-level service with Legacy's Concierge Program.

	ELEVATED CONCIERGE-LEVEL SERVICE		
	GOLD	PLATINUM	DIAMOND
	Legacy's Gold-Standard Service*	\$2-\$5 Million Annual Paid Premium	\$5,000,000+ Annual Paid Premium
<b>THE LEGACY ADVANTAGE</b>			
Multiple carriers under one roof to simplify and streamline your business	✓	✓	✓
Access to exclusive product innovations	✓	✓	✓
FireLight® e-app solution to save time and ensure apps are in good order the first time	✓	✓	✓
Sales illustrations and solutions-focused sales tools	✓	✓	✓
One-stop shop LegacyNet® access for comprehensive business management	✓	✓	✓
<b>COMMISSIONS</b>			
One combined commission statement for all carriers	✓	✓	✓
One 1099	✓	✓	✓
Same-day commission payment	✓	✓	✓
No commission hold over \$35K**			✓
Monthly data feed to help you manage your commissions†			✓
<b>SALES AND MARKETING SUPPORT</b>			
Access to experienced Marketing Field Support team	✓	✓	✓
Dedicated Relationship Manager for personalized sales support	✓	✓	✓
Advertising customization for simplified prospecting		✓	✓
Advance notice of product changes, rate announcements, and special programs			✓
<b>NEW BUSINESS AND SUITABILITY HELP</b>			
Application scrubbing and suitability pre-review	✓	✓	✓
Dedicated e-mail address for priority contact		✓	✓
<b>ADMINISTRATIVE SUPPORT</b>			
Personalized training on new products, carriers, regulations, and other items that impact your business		✓	✓
Proactive reminders for expiring or due credentials to prevent business delays		✓	✓
Monthly policyholder service feeds to help manage inforce business†			✓

See the following page for qualification details.

\* Available to all Legacy-contracted Producers. Excludes LOAs.

\*\* The writing Producer must have excellent credit and no outstanding chargebacks, debit balance, or monies owed to Legacy or other companies at the time of payment.

† To receive automated data feeds, you must provide SFTP (secure file transfer protocol) access.

# Qualifying Premium for Platinum and Diamond Levels

- Qualification for Platinum- and Diamond-level service in 2024 is based on premium paid January 1–December 31, 2023, on Legacy-exclusive products currently open to new sales.
- Newly contracted Producers are eligible with proof of at least \$2 million (Platinum Level) or at least \$5 million (Diamond Level) fixed index annuity production in 2023 and submission of three applications for Legacy-exclusive products within 90 days of contracting with Legacy.
- Premium that has any activity resulting in a chargeback is excluded.
- Contracts that are cancelled for any reason are excluded from qualifying premium.

## Program Guidelines

- Qualification is for the writing Producer based on personal production. LOAs are excluded.
- The writing Producer must: (1) be contracted with Legacy; (2) be licensed and appointed with at least one Legacy carrier partner and in good standing; and (3) have no outstanding chargebacks, debit balance, or monies owed to Legacy upon qualification.
- This promotion is offered solely by Legacy Marketing Group, and Legacy, at its sole discretion, reserves the right to: (1) determine participant eligibility, (2) exclude from this program any products that may be discontinued or released in the future, and (3) revise or discontinue this program at any time.

### Questions?

**Contact the Legacy Sales Team at 800-395-1053, Ext. 4002, or [marketing@legacynet.com](mailto:marketing@legacynet.com).**

Visit [www.legacynet.com](http://www.legacynet.com) today to see all the great products and services Legacy has to offer!



As an independent insurance Producer, you are ultimately responsible for complying with state and federal laws governing the marketing of insurance products, including annuities, and for avoiding any potential conflicts of interest when making product recommendations to prospective clients to ensure the product recommended is suitable and in the best interest of the client. Commissions paid under the program may be required to be disclosed to clients.