



2024 Legacy Honors® Producer Conference

PROGRAM DETAILS AND RULES

Legacy Honors is the rewards program that honors your dedication to serving your clients. Now members have the opportunity to be one of 50 top Producers to join Legacy for a peer-to-peer networking and educational event in Salt Lake City! Earn your invitation to:

- Gain insights from industry experts.
- Learn the success secrets of elite Producers.
- Discover techniques to enhance and reinvigorate your practice.
- Network, build relationships, and connect with other successful Producers!

DATES

- **September 23–25, 2024**

LOCATION

- [Kimpton Hotel Monaco](#), Salt Lake City, UT

QUALIFICATION

- Qualification is by invitation only, based on top qualifying premium submitted and paid between January 1, 2023, and June 30, 2024, on Legacy Exclusive Products. Attendance is limited to 50 qualifying Producers.
- Minimum personal production must be at least \$2 million in qualifying premium with a minimum of three applications during the eligibility period. On split cases, eligible Producers will get credit only for their proportion of the premium.
- Qualification is complete only upon invitation. Qualifiers must confirm participation. If a qualifier is unable to attend, his/her invitation will be extended to the next qualifying Producer.
- Non-commissionable premium will not be included.
- Premium for cancelled policies or qualifying premium resulting in a chargeback will not be included.
- Legacy reserves the right to exclude from this program any products that may be released in the future.
- All qualifiers must be licensed, contracted, appointed, in good standing, and have no debit balances at the time of the event.
- Since this is solely an educational and networking event, guests are not allowed.

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Meeting in the Mountains

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ELIGIBILITY

Qualifying Producers must:

- Be contracted with Legacy at the RD level or below and in good standing. LOAs are not eligible.
- Be enrolled in the Legacy Honors program.

TRAVEL AND EXPENSES

- Attendees will be reimbursed after the event for the cost of airfare, not to exceed \$500.
- Attendees are responsible for arranging travel to and from the destination.
- Legacy will cover the costs of:
 - > Educational business sessions and industry expert guest speakers.
 - > Hotel accommodations (including sales tax) for each qualifier.
 - > All Legacy-sponsored food events (welcome reception, breakfast, lunch, and dinner) for the qualifier.

PROGRAM GUIDELINES

- Qualification credit is given to the Producer number(s) designated on the application.
- Qualification is complete only after qualifiers receive official notification from Legacy.
- Any Producer who qualifies, but for any reason does not attend, forfeits all rights and/or claims under this program.
- Participation in this event is nontransferable, and no cash or alternative payment will be awarded.
- Legacy is not responsible for event changes, postponement, or cancellation resulting from situations or events unknown to Legacy or outside its control.
- If the Producer cancels within 15 days of the event or fails to attend, he/she may be responsible for reimbursement of the cost of the event.
- This program is offered solely by Legacy Marketing Group®, and Legacy, at its sole discretion, reserves the right to determine participant eligibility and revise or discontinue this program at any time.

IMPORTANT TAX INFORMATION

- Producers are responsible for all federal/state income tax incurred as a result of qualifying for this program. The approximate value of the travel portion of this event will be reported as income earned on a Form 1099 for 2024. Legacy recommends that you consult a tax advisor regarding any tax ramifications, as they apply to you.

Please contact your Legacy Relationship Manager
if you have any questions, 800-395-1053, Ext. 4002.



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.