



2018 Trusted Choice® Marketing Reimbursement Program (MRP) Guidelines

In order to deliver the brand experience to your customers consistent with Trusted Choice, Trusted Choice will reimburse a portion of expenses incurred **in 2018** by Trusted Choice agencies in cobranding advertising and marketing materials; and in creating or updating a digital presence to include the Trusted Choice logo. This is not meant to replace your agency's brand, but to complement it by including the **Trusted Choice** branding in your marketing efforts. **Reimbursement will only be made for use of the Trusted Choice logo** (not the IIABA association logo, which looks very similar). All reimbursements will be made per the tiered schedule below.

There are four guiding principles of the Marketing Reimbursement Plan:

- Allows for any activity involving the Trusted Choice logo in external messaging with consumer impact for new members and first time MRP users; and for an updated digital presence for all members who have not been reimbursed for a digital upgrade in 2016 or 2017.
- The application must provide reasonable documentation that an expense was incurred and paid.
- The nature of the expense is reasonably correlated to the external messaging and promotes the Trusted Choice brand to consumers.
- **The MRP will not reimburse ongoing expenses like website hosting/maintenance, directory listings, subscriptions to marketing services, expenses for yellow pages ads, or other phone book type advertising.**

Tiered Reimbursement Schedule

There are 2 levels of reimbursement provided by the MRP in 2018:

Tier 1: **Available for new members and first time MRP users only.**

The MRP will reimburse up to \$750 for use of the Trusted Choice logo on any consumer-focused items. All eligible agency locations will be reimbursed at 50% of the invoice amount, up to \$750 maximum reimbursement per member location. This includes, but is not limited to, Freedom Campaign ad materials, promotional items, original advertising (non-Freedom campaign ads), signage, or collateral items like business cards or stationery.

For Freedom Campaign ad materials and customizations email Trusted.Choice@iiaba.net. Freedom Campaign ad materials can be customized free of charge by Trusted Choice and returned to you ready for your vendor.

Tier 2: **Available to all agency locations who were not reimbursed for a digital upgrade in 2016 or 2017.**

All eligible agency locations will be able to be reimbursed up to \$500 for a digital upgrade using a web developer/vendor. This will include updates to an agency's website, social media, or mobile app. These must be updated in conjunction with the website and social media checkups that are offered by



Trusted Choice. The checkup is required, and suggestions will be made to the agency for website improvements. Website updates are required to include the Trusted Choice logo, in addition to the website checkup performed by Trusted Choice. Social media and mobile app updates need to include the Trusted Choice logo, in addition to the social media checkup. All Reimbursements will be made at 50% of the invoice amount, for expenses incurred specific to the update. **Invoices for website hosting/maintenance are not-acceptable for reimbursement.**

New members or first time users of the MRP can be reimbursed up to \$1250 if they take advantage of both tiers 1 and 2. All agency member locations who were not reimbursed for a website upgrade in 2016 or 2017 can be reimbursed up to \$500 for the tier 2 digital update as a one-time reimbursement. All funds reimbursed are on a first come first served basis. **Trusted Choice reserves the right to deny any request for reimbursement that uses the Trusted Choice logo in a manner that is not consistent with the Trusted Choice Brand Style Guide or the guidelines of the MRP. Only the Trusted Choice logo is eligible for reimbursement from the MRP.**

To apply for reimbursement, a Trusted Choice Agency must submit to Trusted Choice:

- the completed reimbursement application form (on the next page of this document or at <https://cobrand.iiaba.net/money/marketing-reimbursement-program-guidelines>)
- the approved design proof/sample/picture of each of the materials to be reimbursed (in color if possible). For digital (tier 2) reimbursement no proof is necessary, but please include agency's web address in the space on the form.
- invoice(s) **or** receipt(s) showing proof of payment

All invoices must be dated in 2018. Applications can be submitted on the website at <https://cobrand.iiaba.net/money>, mailed to the address on the form, or emailed to Trusted.Choice@iiaba.net.

Applications are considered in the order they are received. Allow a minimum of 8 to 10 weeks for processing, but be aware that it may take longer depending on volume of applications received at any given time.

If you are unsure about an item or use of the logo, want to get pre-approval of an item or proof prior to printing, or need to check if your agency (or branch locations) is eligible for tier 1 reimbursement, email us at Trusted.Choice@iiaba.net or call 800.221.7917.



**2018 Trusted Choice®
Marketing Reimbursement Program (MRP) Application**

PLEASE REVIEW THE GUIDELINES FOR REIMBURSEMENT, INCLUDING THE CHANGES FOR 2018 and COMPLETE ALL OF THE INFORMATION REQUESTED BELOW. TRUSTED CHOICE® WILL NOT CONSIDER ANY REIMBURSEMENT REQUEST WITHOUT ALL REQUIRED INFORMATION AND MATERIALS.

RETURN:

D THIS FORM, WITH ALL INFORMATION REQUESTED

D APPROVED DESIGN PROOFS FROM THE VENDOR or SAMPLE/PICTURE OF ITEMS

D COPY OF INVOICE or RECEIPT SHOWING PROOF OF PAYMENT (must be dated in 2017~~8~~)

DATE: _____

AGENCY NAME: _____
(Please print clearly the exact name that should appear on the check, as it appears in Trusted Choice®)

MAILING ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

CONTACT: _____

PHONE: _____

EMAIL: _____

TOTAL AMOUNT SPENT: _____

REIMBURSEMENT AMOUNT SOUGHT: _____

FOR TIER 2 DIGITAL REIMBURSEMENT PLEASE PROVIDE APPLICABLE WEB or SOCIAL MEDIA ADDRESS: _____

Additional Comments:

Send in this completed form and all required supporting materials to:

**Trusted Choice®, Inc.
Attention: MRP
127 South Peyton Street
Alexandria, VA 22314**

**OR BY EMAIL TO:
Trusted.Choice@iiaba.net**

Applications are processed in the order received. Allow a minimum of 8 to 10 weeks for processing, but be aware that it may take longer depending on volume of applications received at any given time.

We accept applications for reimbursement through February 2019, provided invoices are dated in 2018 – and if funds allocated to the MRP have not been exhausted.