

2025 COMPANION LIFE LEADERS CONFERENCE
HAWAII
Four Seasons Resort, Hualalai | June 15 - 20, 2025



AGENT

QUALIFICATION PERIOD: January 1, 2024, to December 15, 2024

QUALIFICATION LEVELS

Level 1 Qualification is \$350,000; 5 case minimum over 25 lives enrolled.

Invitation is for producer and guest, including round trip airfare for both to Kona International Airport.

Level 2 Qualification is \$700,000; 10 case minimum over 50 lives enrolled.

This level includes two level 1 trips.

Cases written must fall within effective dates of January 1 - December 15, 2024. (Effective dates are issued on the first and 15th of each month.)

QUALIFICATION RULES

Meet minimum sales requirements for qualification in the appropriate category.

Attendees will receive a 1099 for the taxable portion of the trip for themselves and their guest. A minimum of five cases is needed to qualify for either level.

Multiple invitations based on agent production in excess of basic qualifications are allowed for licensed agents within the same agency. A maximum of two qualifications per agency is allowed.

When a case is to be split for case count or conference qualification credit, it must be approved at the time of submission. *No end-of-year splitting will be allowed.*

All Companion Life Group Dental, Vision, Critical Illness, Group Long Term Disability, Group Short Term Disability, Group Life and all other ancillary products will receive 100% production credit and 25% production, toward a maximum credit of \$150,000 for all GAP and Stop Loss products.

Attendance at the conference is dependent on the producer being currently appointed with Companion Life at the time of the conference to sell the lines of business for which credit was applied during the conference qualification period. Only licensed producers are eligible. Only the named producer receiving commissions will receive credit for a specific case.

Leaders Conference invitations are not transferable without prior written consent from Companion Life and are subject to all qualification rules. *SOME LIMITATIONS APPLY.*