

## Gift Card & Client Referral Program:

Staff :

Our Client Mastercard Gift Card Program will start Jan 1 2024.

The program details below will be sent to all house clients and selected Producers who join.

will manage this and any referrals can be sent there.

Current clients can refer friends and family and will receive gift card.

Client must have permission to share their referral name, number, or email.

This will be for Home or Business only.

If Policy is bound a disclosure will be made in Epic and given to new client showing them amount paid for referral.

Dear Clients,

We are proud to announce our Gold Key Mastercard Gift Card program. If you refer your friends and family for their Home or Business Insurance, we offer you a token of our appreciation in the form of a Gold Key Mastercard.

The client you refer to us must purchase Home or Business insurance for you to qualify for a Gift Card.

This program is our way of saying "Thank you" for spreading the word about our services.

Everybody needs some form of insurance, and they need to go a broker that has all the Top Canadian Insurance companies that provides accurate insurance coverage, at the most competitive price.

Your Gift Card Rewards:

What we need from you:

Step 1: Get permission first. Ask your friends or family member if they want to save money on Home or Business insurance and they are happy to receive a call from a Gold Key licensed representative.

If possible, find out when they renew so we make sure we call them before. If Yes.

Step 2: ☐ Send the referral information below to your contact your account manager or directly to

Step 3: We will let you know when we have received and contact again once if they successfully purchase the insurance.

Last Step: Receive your Gift Card in the Mail.

Rules : No clients are to be sent without permission otherwise it may lead to the end of this offer.