

Assurity®

LEADERS' CONFERENCE  
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FAIRMONT KEA LANI

MAY 20 - 24, 2026

INDIVIDUAL SALES QUALIFICATIONS & RULES

# 2026 Leaders' Conference Qualifications and Rules

Assurity Individual Sales

## Qualification Period

Jan. 1, 2025 through Dec. 31, 2025

## Eligibility

All personal producers (subject to hierarchy approval) and all direct-to-Assurity hierarchies are eligible to qualify for an invitation to the 2026 Leaders' Conference. A qualifier who is invited to attend the Leaders' Conference may invite a spouse, a family member or a guest approved by the company to accompany them at the company's expense. Office staff, clerical support and/or other producers/distributors are not approved guests for Leaders' Conference attendance.

## Individual Sales Qualification

### Personal Production

Must be a **top-15 agent** in first year weighted annualized premium, subject to minimums of **\$100,000** in first year weighted annualized premium and **15 placed policies**

### Hierarchy Production

Must be a **top-10 direct-to-Assurity or national account downline hierarchy** in first year weighted annualized premium, subject to minimums of **\$450,000** in first year weighted annualized premium and **60 placed policies**

**Product Weighting - Leaders' Conference and President's Circle**  
Annualized premiums for all products are weighted at 100 percent except the following, which are weighted at 6 percent:

- Single Premium Whole Life and Annuities
- PUA riders and UL premium in excess of target premium

Annuity sales or sales of other products where the source of funds is qualified money may not be eligible for Conference or President's Circle qualification.

## President's Circle Qualification

*Includes an additional night's stay and a special recognition dinner.*

**Personal Production** – Must be a **top 5 agent** in first year weighted annualized premium, subject to minimums of **\$100,000** in first year weighted annualized premium and **15 placed policies**

**Hierarchy Production** – Must be a **top 2 direct-to-Assurity hierarchy** in first year weighted annualized premium, subject to minimums of **\$450,000** in first year weighted annualized premium and **60 placed policies**

## Rules

1. An individual may qualify either through personal production or as the principal (or assigned designee) of a qualified hierarchy, but not both.
2. Qualification is based on first year annualized premium multiplied by the applicable weighing factor. (Adjustments are made for reissues and replacements.)
3. Business must be issued and placed. Canceled business will be deducted from first year weighted annualized premium.
4. Business written by a personal producer on themselves or their immediate family will not be counted toward conference qualification.
5. Qualifying premium cannot be transferred or assigned.
6. The principal of a qualifying hierarchy may select a designee to attend on their behalf, subject to Assurity approval.
7. Attendance is by invitation only. Qualification does not guarantee an invitation. Quality of business is also a consideration.
8. Qualifiers must hold a current contract and be in good standing with Assurity at the time of the Conference to be eligible to attend.
9. An adult guest may not be another licensed agent unless they are the qualifier's spouse/significant other.
10. Qualification for Leaders' Conference is not redeemable for cash or other remuneration. There is no cash equivalent or other award if a producer does not accept an invitation to the Leaders' Conference.
11. A 1099 will be issued to all Leaders' Conference attendees (qualifier and spouse/guest) for the fair market value of the trip. Assurity reserves the right to charge a qualifier's account, due to late cancellation or failure to attend, for actual expenses incurred by the Company on behalf of either the qualifier and/or spouse/guest, to include but not limited to airfare, hotels, transfers, activities and functions.
12. The 1099 will be directed to the production source, regardless of who attends the conference.
13. The following items are included for qualifier and spouse/guest only:  
Airfare – a roundtrip ticket from designated gateway cities in the U.S. converging at a hub airport for travel to the Conference site, four nights lodging, hosted meals and hosted activities. If a qualifier does not have a spouse or significant other, or when such person cannot attend the meeting for sound reasons, we will welcome a relative of the qualifier who is at least age 18.

*continued >>*

## Rules (continued)

14. Air travel reservations must be made through Assurity's selected travel representative. Any additional pre- or post-extension for air travel, which changes the cost of travel for the Conference dates, will be at the qualifier's expense. Any change of itinerary, which incurs a change fee or an additional cost of the ticket, will be at the qualifier's expense. Any pre- or post-Conference arrangement for rooms must be handled between the qualifier and Assurity's selected travel representative and is dependent upon room availability.
15. Any expense other than airfare incurred during travel by qualifier and spouse/guest to the Conference site, including airport parking, meals while en route to Conference, mileage to airport from home, any hotel expense the night before or after departure, etc., will be at the qualifier's expense.
16. Conference qualifications and guidelines cannot be modified, except in writing by a senior officer of Assurity. Continuation of future Leaders' Conferences is at the discretion of Assurity.

Note: New York business does not count toward incentive credits. These rules supersede any and all prior rules or agreements for Leaders' Conference qualification. All rules are at the discretion of Assurity and may be modified to meet changes that may occur during the qualification period. The decision of Assurity on any interpretation of these rules shall be conclusive.

**Assurity**<sup>®</sup>