

**EXTENDED!**

# STEP UP

your Small Groups with our gift card bonus

Increase your rewards for selling a group when you work with our sales representatives during finalist meetings and KP Experience Tours. Earn gift cards for growing your business with Kaiser Permanente, now extended from February 1, 2023 to January 15, 2024.

15-50 eligible employees		Example
STEP 1	Conduct a finalist meeting or attend a KP Experience Tour with your Kaiser Permanente sales representative. <b>\$500</b>	You conduct a finalist meeting with your Kaiser Permanente sales representative. You sell the new group and enroll 11 members out of 18 eligible employees.  Your incentive reward is \$500 for successfully completing STEP 1 and \$500 for successfully completing STEP 2.  <b>Total bonus is \$1,000.</b>
STEP 2	Win. Successfully create a new customer and <b>enroll 10+ members</b> by partnering with your Kaiser Permanente sales representative during the finalist meeting or KP Experience Tour. <b>\$500</b>	



## Terms and Conditions

- All licensed and appointed Kaiser Foundation Health Plan of the Mid-Atlantic States, Inc. (Kaiser Permanente), agencies and brokers who are authorized to solicit, negotiate, and sell new business on behalf of Kaiser Permanente are eligible. General agents, and any agencies or brokers who are not authorized to solicit, negotiate and sell new business on behalf of Kaiser Permanente, are not eligible for compensation under these bonus programs.
- This extended program is effective from February 1, 2023 through January 15, 2024.
- A group for which broker completes Step 1 and/or Step 2 activities must have an effective date that falls within the bonus program effective dates.
- Agencies not qualified as of February 1, 2023 can attain qualification during the year.
- All Kaiser Foundation Health Plan of the Mid-Atlantic States products qualify.
- This program does not affect commission payments; bonus program rewards are paid in addition to scheduled commission payments.
- Kaiser Permanente will only pay compensation to brokers who are appropriately licensed and appointed at the time of the qualifying activities, sale, and payment, and who are located in the same jurisdiction as the group.
- Group size is based upon the count of eligible employees in the Kaiser Foundation Health Plan of the Mid-Atlantic States service area listed in the group's census.
- Step 1 and Step 2 bonuses are paid directly to the broker representative via digital gift cards upon the discretionary approval of sales management and only after the documented approval by agency leadership that the broker representative is eligible to receive the gift card.
- Digital gift cards will be distributed to the broker within 60 days after the group effective date.
- A broker can only receive one gift card per step per group.
- A "finalist meeting" is defined as a presentation where Kaiser Permanente presents to the broker's eligible new client as a finalist for consideration to offer health care coverage. A minimum of one decision maker from the prospective client must be present. The decision maker can include a company owner, C-suite executive, and/or HR Benefits Manager.
- A "KP Experience Tour" is defined as a scheduled tour with a Kaiser Permanente sales representative by broker and new client (with an active RFP) at a KP facility (medical office building, clinic, or hospital, not administrative/business offices). A minimum of one decision maker from the prospect client must be present during the tour.
- Brokers are responsible for complying with all legal requirements regarding disclosure of compensation by Kaiser Permanente in the form of commissions, bonuses, and other rewards.
- Kaiser Permanente reserves the right to cancel or change the terms and conditions of this bonus program at any time.
- Kaiser Permanente and/or its designated representatives retain sole discretion over the interpretation of the terms and conditions of, and any or all provisions in, this compensation plan, and over resolution of any disputes from this compensation plan.
- Bonuses will be reported and disclosed in accordance with Kaiser Permanente policy and applicable law. Brokers who fail to meet the provisions of the Kaiser Permanente broker/agent agreement are not eligible for payment.

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