



*Relentless Support  
for Financial Professionals*

## **Annuity Producer Referral Program**

**As the old saying goes: “It’s not what you know but who you know” .....**

Well we really don’t mean to diminish what you know because obviously that is really important to your clients. And, we certainly hope what we know is important to you. But let’s face it this is a relationship business, so who you know is critical to your success and ours.

PFG Marketing Group is always on the lookout for new producer clients. We have learned from years of experience that many of our best clients come from referrals by advisors that currently work with us.

So we want you to **“Tell a friend”** about PFG and get rewarded for it. Talk to your colleagues, friendly competitors or worthy adversaries about PFG’s Relentless Support, introduce them to us and we’ll take it from there. If they contract with us, **you will receive compensation in the form of a referral bonus based on their production for the first 2 years.**

### **PFG Referral Program Details**

- If a producer contracts with PFG Marketing Group as a result of a personal introduction by an existing contracted producer (Referrer), PFG will pay a referral bonus based on the new producer’s production for up to 2 years. To qualify for the referral bonus, a properly executed PFG Referral Agreement must be in place prior to contracting. The new referred agent must be contracted at street level, be appointed direct to PFG and not affiliated with any PFG sub-marketing group.
- The referral bonus will be a maximum of 50 basis points for the first year and 25 basis points for the second year subject to a 1<sup>st</sup> year production requirement. This is based on a typical, fully commissionable 10 year annuity. On sales of products with shorter durations, older clients or niche products where the compensation is lower, the referral bonus will be reduced proportionately. The referrer must continue to be contracted and in good standing with PFG to be eligible for the referral bonus.
- The “first year” will be measured from the effective date of the first carrier contract the referred producer signs with PFG or 60 days from initial contact, if sooner.
- In order for the Referrer to receive a referral bonus for the second year, the new producer must have paid annuity business through PFG in the first year of at least \$250,000. If the new producer does not meet this first year production requirement, there will be no referral bonus in year two.
- Referral bonuses will be paid quarterly based on the new producer’s paid production for the previous quarter. Referral bonus rules are subject to change at PFG Marketing Group’s discretion.

**Tell a friend ♦ Make an introduction ♦ Producer writes \$2 million  
You make \$10K year 1 ♦ \$5K year 2 ♦ Help us – Help yourself.**

**Call 800-944-1831 For Details**