



NEW YORK

## WHAT WE WILL COVER TODAY

1. **WHO** we are
2. **WHAT** we do
3. **WHY** so many people are joining us right now

## LEGALSHIELD

- Established 1972
- Annual revenue approximately \$450 million
- 3.7 million covered lives across U.S.A. and Canada
- 2.1 million requests for legal assistance annually
- More than 650 employees based in Ada, Oklahoma including extensive in-house customer service representatives



## **IDSHIELD**

- More than 200,000 personal identity consultations
- Nearly 10,000 individual identities restored
- Over 1 Million covered lives



## DEDICATED BUSINESS SOLUTIONS DIVISION

- 34,000 Employee Benefit Accounts (“Groups”)
- 47,000 Small Business Accounts
- 12,000 Commercial Driver Legal Plans





## OUR DIFFERENTIATORS

- We have a **proprietary network** of law firms covering 49 states and Canada
- Law firms paid **on a per capita basis** (over \$100M paid per annum).
- Service quality is guaranteed by LegalShield provider law firms **quality control systems** (including real-time monitoring).
- Comprehensive Identity Theft **restoration** services through **licensed investigators**.
- **24/7/365 access** in covered emergency situations

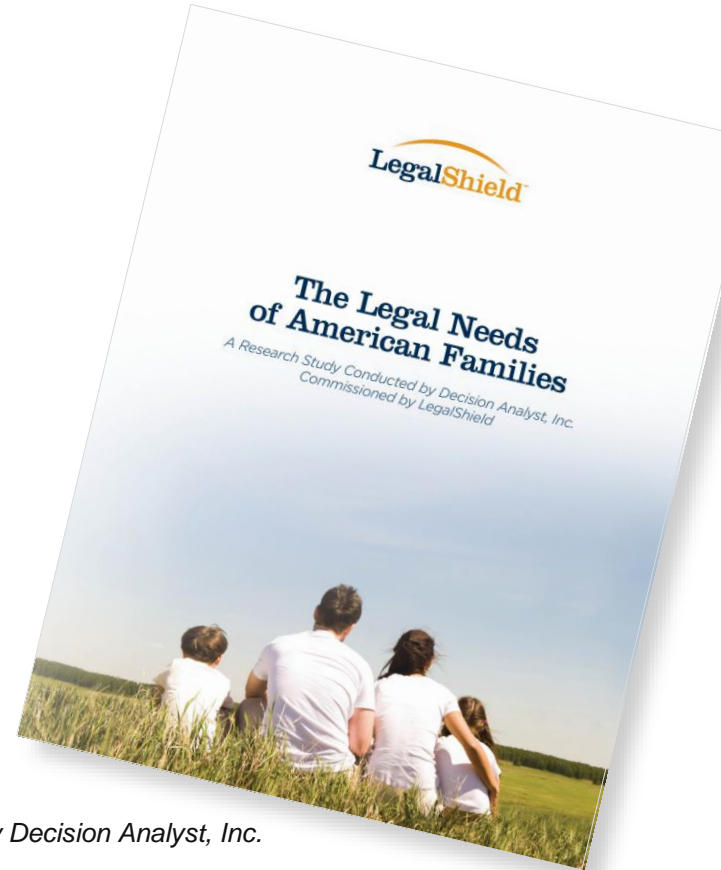


## YOU NEED LEGALSHIELD

- LegalShield gives you the ability to talk to a lawyer on any personal legal matter **without worrying about high hourly costs.**
- For **one flat monthly fee**, you can access legal advice, no matter how traumatic or trivial the issue.
- Under the protection of LegalShield you and your family can live your life on your terms **worry-free, every day, every night.**

## THE NEED IS THERE

- 93% of respondents believe lawyers charge too much.
- 76% of respondents said that they were hesitant to call a lawyer.
- 9 out of 10 respondents said if cost were more affordable, they would seek legal advice.

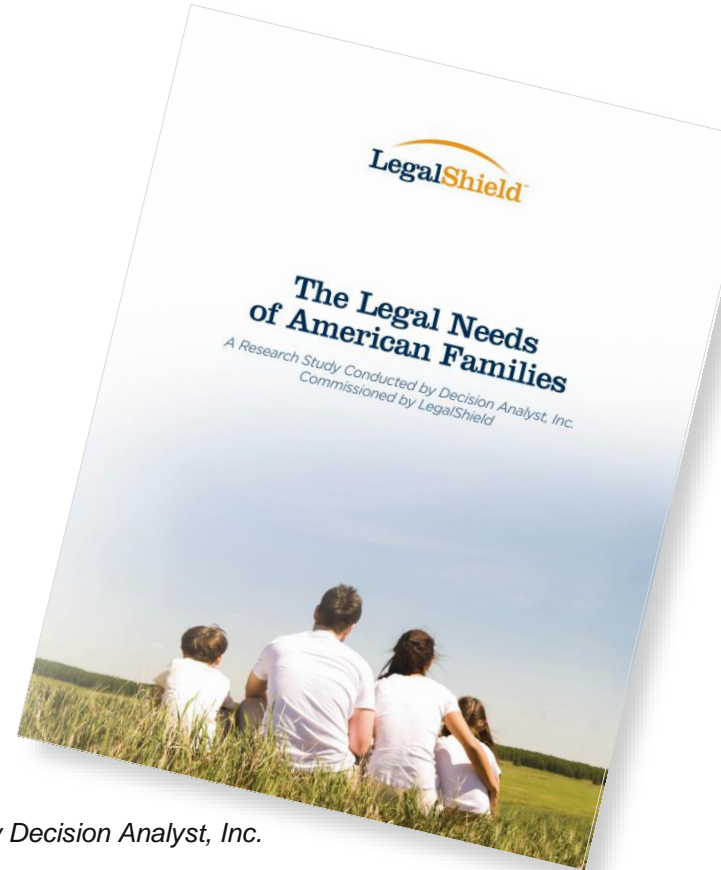


Source: *The Legal Needs of American Families. A Research Study Conducted by Decision Analyst, Inc. Commissioned by LegalShield*



## THE MARKET IS READY

- Nearly 90% of Americans say they do not have any form of legal insurance or legal protection service.
- Two-thirds of Americans say they have never heard of any such plans or services.
- More than 60% reported they would be interested in purchasing legal protection.



Source: *The Legal Needs of American Families. A Research Study Conducted by Decision Analyst, Inc. Commissioned by LegalShield*



## BOTTOM LINE FOR EMPLOYERS

Employee legal problems cost employers in terms of:

- Absenteeism
- Reduced Productivity
- Increased Health Insurance Costs

**57** million full-time working Americans experienced at least one significant legal event in the past 12 months.

**40%** did not seek legal help or advice for their problems

Source: *The Legal Needs of American Families. A Research Study Conducted by Decision Analyst, Inc. Commissioned by LegalShield*

## TIMING IS KEY

The three major divisions of the **insurance industry** have already achieved billions in market share.



# Portfolio of Services

PROVIDING POWERFUL BENEFITS • PROTECTING FAMILIES & BUSINESSES • HELPING BENEFITS PROFESSIONALS MEET MORE NEEDS

## Check the Features You Want and Then Choose the Plan(s) for You

You've thought about it for years—do you finally want to complete your Will? Or do you want an attorney to write a letter on your behalf? Or review a document for you before you sign? Are you interested in having a legal plan for your small business, or in guarding yourself against identity theft? Check, check, and check. We have a plan for you.

## For Individuals, Families & Employees

### Legal Plan

**Talk to an attorney. No high hourly costs.**

- ❑ Family plan covers member, spouse and dependents
- ❑ Individual plan covers member (with no spouse/dependents/children)
- ❑ Standard will preparation
- ❑ Legal advice/consultation/representation
- ❑ Letters/phone calls on your behalf
- ❑ Legal document review
- ❑ Trial defense
- ❑ 24/7 emergency assistance
- ❑ Mobile App
- ❑ 25% Preferred member discount

### Legal Plan Add-Ons

**Bolster the power of your legal plan.**

- ❑ Covers member, spouse, and dependents
- ❑ Trial Defense Supplement
  - More trial coverage
- ❑ Home Business Supplement
  - If you own a home-based business, are a consultant, or have rental property—and have no employees.
- ❑ Home Business Supplement+GoSmallBiz.com
  - Business tools, training courses, business coaching, & unlimited business consulting

### IDShield<sup>SM</sup>

**Coverage that will help protect against, and resolve, identity theft issues.**

- ❑ Family plan covers member, spouse, and up to eight minor dependents
- ❑ Individual plan covers member only
  - Identity theft advisor
  - Credit report review
  - Lost wallet protection
- ❑ Notifications
  - Data Breach Notifications
- ❑ Access
  - Monday through Friday 7 am - 7 pm CT
  - 24/7/365 Emergency access to an IDShield<sup>SM</sup> Licensed Private Investigator for covered situations
- ❑ Security Monitoring
  - Black Market Web Surveillance
  - Credit monitoring
  - Minor Identity Protection
- ❑ Identity Restoration
  - Licensed private investigators
  - \$5 Million Service guarantee

## For Your Small Business

**Small Business Plan\* (Up to 100 Employees)**  
Your business deserves affordable legal protection.

- ❑ Covers for-profit, not publicly-traded businesses
- ❑ Legal consultation on unlimited matters
- ❑ Contract and document review
- ❑ Debt collection assistance
- ❑ Legal document review

## For Commercial Drivers

**Commercial Drivers Legal Plan (CDLP)**  
Protects your ability to earn a living.

- ❑ Covers licensed commercial drivers
- ❑ Assistance with motor vehicle accidents
- ❑ Assistance with traffic citations

## HAVE YOU, YOUR EMPLOYEES OR CLIENTS EVER...

- Signed a contract or document?
- Been overcharged or treated unfairly?
- Received a traffic ticket?
- Known a victim of identity theft?
- Put your estate in order?



# LEGAL PLAN FOR INDIVIDUALS/EMPLOYEES NY – STANDARD PLAN

Pricing \$15.95 month

## Our Services

- **Legal Advice** on unlimited issues
- **Letters/Calls** made on your behalf
- **Contracts/Documents Reviewed** up to 10 pages
- **Online Legal Forms/Videos**
- **Lawyers Prepare**
  - Your Will, Living Will, Health Care Proxy
- **Traffic-Related Issues**
- **24/7 Emergency Access** for covered situations
- **25% Preferred Member Discounts\***



## If you were my lawyer, what would you charge for these services?

\* Up to 90% of member inquiries are covered by the plan with no additional fees. All other requests for service are entitled to a 25% discount on the law firm's hourly rate (including pre-existing issues).

Review the membership contract for the plan selected and state of residence for full details on benefits, limits and exclusions as legal advice is subject to the provider attorney's independent professional judgment.

## THE NEW YORK COMPREHENSIVE PLAN INCLUDES. . .

### Standard Plan plus...

- Trial Defense Services\*
- IRS Audit Legal Services\*
- Warranty Assistance
- Review Leases & Documents
- Assistance in Contacting Government Agencies
- Personal Financial Alternatives Review
- Legal Advice on Settlement of an Estate
- Tenant Review and Advice
- Small Claims Court Advice
- Consumer Protection Benefits

\*These services available at \$49 per hour.

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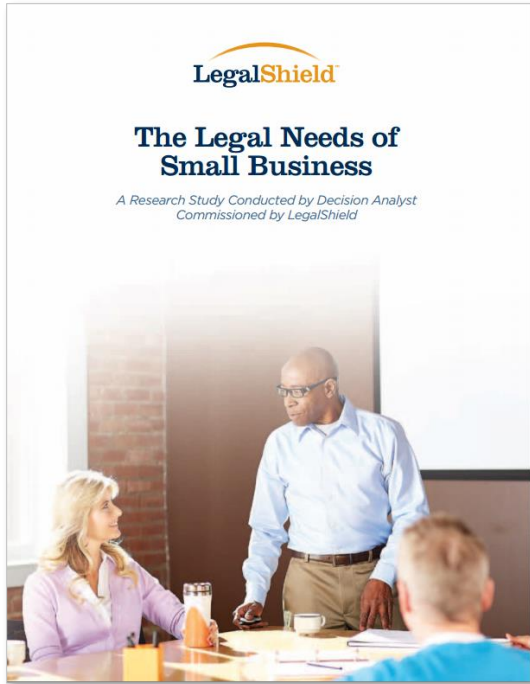


## WHO'S COVERED

- The member
- The member's spouse
- Never-married dependent children under age 21 and living at home
- Dependent children under age 18 for whom the member is legal guardian
- Full-time college students up to age 23; never-married, dependent children
- Physically or mentally disabled children living at home



## SMALL BUSINESS FACTS



- Nearly 60% of small businesses have experienced **significant legal events** in the past two years
- Those who experienced a legal event in the past two years reported **not hiring an attorney** to help them citing high costs as the reason
- Owners reported spending an **average of \$7,600** in legal expenses per year

## AS A SMALL BUSINESS OWNER HAVE YOU OR THOSE YOU EMPLOY EVER...

- Hired or fired employees?
- Had issues with debt collections?
- Been in a situation where you thought the advice of a lawyer might be useful?
- Been in a dispute with a vendor?



## SMALL BIZ 10, 50, AND 100 NEW YORK, NEVADA

**Small Biz Plan Benefits** — Business must be for-profit and cannot be publicly traded

	Small Biz 10	Small Biz 50	Small Biz 100
Employees	10 or fewer	50 or fewer	100 or fewer
Monthly Price	\$39	\$79	\$149
Authorized Users	Up to 2	Up to 3	Up to 5
Legal Correspondence per year	20	30	40
Legal Document Review (up to 15 pages/doc) per year	20	30	40
Debt Collection Letters per month	5	10	15
Reduced Contingency Fee	25%	25%	25%

Rates vary in certain States. **Small Business Plan Cost NV and NY without Trial Defense:** SmallBIZ50= \$79/month, SmallBIZ100= \$139/month. **In HI:** SmallBIZ 10= \$49/month, SmallBIZ 50= \$109/month, SmallBIZ 100 = \$179/month. These plans are available in Canada please see Canadian presentation for details on Canadian plan.

# goSmallBiz.com

\$14.95 per month + Business Plan

## Business Consultation

- Unlimited Business Consultation

## Sales & Marketing

- DIY Website Builder
- Digital Marketing Dashboard
- Customer Relationship Manager
- Expert Web Analysis

## Human Resources

- HR Document Builder

## Online Learning Center

- Mentoring with Fran Tarkenton
- Online Learning Courses
- Weekly Business Updates

## Tax & Accounting

- Transaction Tracker

## Legal Resources

- Business and Legal Forms
- Corporate Minutes Writer
- Risk Assessment

The screenshot displays the goSmallBiz.com website interface. At the top, there's a navigation bar with the goSmallBiz logo and a phone number (866.467.6249). Below the navigation, a dark blue banner features the goSmallBiz logo and the text "EXCLUSIVE OFFER FROM LegalShield". The main content area shows a smiling man and woman in front of a floral arrangement. Below this, a dark blue box contains the text "We've helped more than 300,000 entrepreneurs run and grow their businesses." Two dark blue buttons are present: "GoSmallBiz Supplement \$14.95 per month. That's a 40% savings over retail!" and "Contact your LegalShield associate to get started." with a "VIEW BY ACCOUNT" button. The bottom section is titled "Business Consultation" and includes a play button icon, the text "Get Expert Help When You Need It!", a paragraph about consultants, a "Consultant Expertise" section with a person icon, and a "Response Time" section with a thumbs-up icon. A video player on the right shows a man speaking, with the text "Message from Our Chief Consultant" above it.

## COMMERCIAL DRIVERS LEGAL PLAN

Why offer Commercial Drivers Legal Plan to your drivers?  
Because it means increased profits for you...

### Company Benefits

- Helps reduce costs associated with driver turnover
  - Recruiting
  - Training
  - Cost of unused equipment
  - Loss of revenue from unused equipment
- Helps protect the company from DOT fines by protecting drivers



Review the membership contract for the plan selected and state of residence for full details on benefits, limits and exclusions as legal advice is subject to the provider attorney's independent professional judgment.

## COMMERCIAL DRIVERS LEGAL PLAN

Why offer Commercial Drivers Legal Plan to your drivers?  
Because it means increased profits for you...

### Driver Benefits

- Helps protect family assets in the event of a tragic accident
- Helps protect driver's ability to earn a living
- Driver and spouse are covered in lower 48 States; driver covered in any type of Motor Vehicle.
- Product availability is determined by the State where the driver is standing when the product is purchased.



Review the membership contract for the plan selected and state of residence for full details on benefits, limits and exclusions as legal advice is subject to the provider attorney's independent professional judgment.

# ROAD AMERICA COMMERCIAL DRIVERS LEGAL PLAN

Pricing \$35.95/mo., \$25 enrollment fee  
Group \$32.95/mo., no enrollment fee

## Covers Driver and Spouse

- Tragic Accident Representation
- License Reinstatement
- Moving Violations
- DOT and Non-Moving Violations
- CSA Consultations
- Property Damage and Personal Injury Collection
- 25% Discount on all other Transportation Related Legal Work
- Bail Bond Service
- Arrest Bond Protection
- Motor Club Services

Road America Plan only available in New York and New Jersey. Review the membership contract for the plan selected and state of residence for full details on benefits, limits and exclusions as legal advice is subject to the provider attorney's independent professional judgment.

**Basic Commercial Drivers Legal Plan**

*When you call your Provider Law Firm, they will locate an attorney to act on your behalf. Your Law Firm has the support of qualified attorneys across the country who will help you protect anywhere in the U.S.*

**Basic Commercial Drivers Legal Plan Benefits**

**Tragic Accident Representation**  
You or your spouse is charged with a criminal act because of a serious traffic accident, a Commercial Drivers Legal Plan attorney will defend you in the court of original jurisdiction for the following charges:

- Manslaughter
- Involuntary manslaughter
- Vehicular homicide
- Negligent homicide

**License Reinstatement**  
You and your spouse have 25 hours of legal help from a Commercial Drivers Legal Plan attorney in each of the following situations:

- Your driver's license is cancelled, suspended, or revoked by the Department of Public Safety or Department of Motor Vehicles where a right to appeal is provided to you by statute.
- Assistance is needed to retest or maintain a driver's license because of job-related or medical reasons.

**Moving Violations**

- Defense of non criminal moving violations in the court of original jurisdiction.
- Defense by an attorney located through your Commercial Drivers Legal Plan Provider Law Firm.
- The attorney appointed for you is usually located in the area where you received the ticket.

**Additional Information and Guidelines:**  
Benefits are available on the seventh (7th) day after the date of enrollment. Matters occurring before the 7th day will be considered pre-coverage and their spouses are protected by one law monthly fee.

All benefits are subject to the following conditions and exclusions: Any fines, court costs, penalties, expert witness fees, bonds, bail bonds, or the member's expense. Breaching conditions, charges of DWI/DWI related matters, drug related matters, drug related charges, or untruthfulness cases are excluded. Also excluded are acts or omissions performed in the commission of any crime under any municipality, or sentencing provided for and covered within the contract.

**Waiver:** Representation provided in the court of original jurisdiction. Representation provided for you and your spouse if you are present for vehicle with the express consent and permission of the owner of the vehicle. In order to receive legal services under this benefit, you will file (5) business days of receiving the citation. Appeals are not covered.

**Personal Injury and Property Damage Reimbursement:** Claims for losses and personal injury settlements are limited to ten and one-half (10 1/2) months of the filing of a lawsuit and include personal injury and property claims that exceed \$2,000. Limits to claims arising as a result of a multi-vehicle accident.

**All Other Transportation Related Legal Work:** Depending on your legal needs, a retainer may be required by your Provider Law Firm's attorney. Your Provider Law Firm is responsible for determining the terms of the retainer and other related costs. Costs are your responsibility and are not included in the plan. Law firms cannot provide any legal services until payment of the retainer and other costs have been made if you have not represented. Law Firm at least ten business days in advance so they may prepare for your case.

Plan not available in AK, HI, MA, MT, NJ, NY, TN or WA.  
The information contained in this material is for illustrative purposes only and is not a contract. It is intended to be an overview of this plan. Please consult the plan contract for actual terms, coverage amounts, conditions and exclusions.

Contracts issued by The Prudential Legal Services, Inc. and subsidiaries, The Prudential Legal Claims®™, Inc., The Prudential Legal Claims, Inc. of Florida, in VA: Legal Service Plans of Virginia, Inc.; and PFL Legal Care of Canada Corporation.

**LegalShield**

**Legal protection on and off the road.**

At LegalShield, we've been offering legal plans to our members for 40 years, creating a world where everyone can access legal protection—and everyone can afford it. As a commercial driver, your livelihood depends upon being on the road and unexpected legal situations can arise every day, and with LegalShield you and your spouse will have access to a qualified law firm when you need it.

On and off the road, we're here to help you with any legal matter from the trivial to the traumatic. And since our dedicated law firms are paid in advance, their sole focus is on serving you, rather than billing you.

**Our promise to you.**

As one of the first companies in the United States to provide legal expense plans to consumers, we now provide legal services to over 14 million families across the U.S. and Canada—representing approximately 4 million people. And with over 700 employees dedicated to serving you, our promise remains the same: to provide outstanding legal coverage by quality law firms at an affordable price.

**Why LegalShield?**

For a low monthly cost, LegalShield gives you the ability to talk to an attorney on any matter without worrying about high hourly costs. We understand that because of your profession, any legal situation you might find yourself in not only affects you, but your family as well, and possibly even your ability to earn a living as a commercial driver. That's why, under the protection of LegalShield, we'll help you take care of the legal needs on the job allowing you to worry less and live more.





**Identity  
Theft is a  
major  
problem in  
America.**



## IMPACT OF IDENTITY THEFT IN AMERICA

### Widespread

**16.6M**

people, or 7% of all U.S. residents age 16 or older, were victims of one or more incidents of identity theft

### Financial

**24.7B**

direct and indirect losses

### Emotional

**6.0M**

people—36% of identity theft victims—reported moderate or severe emotional distress as a result



## Kroll

- World's leading risk consulting firm
- Fortune 500 clientele
- Prepaid and ready to advise
- Unmatched service since 2003
- The most comprehensive identity theft program in the market
- Founded 1972

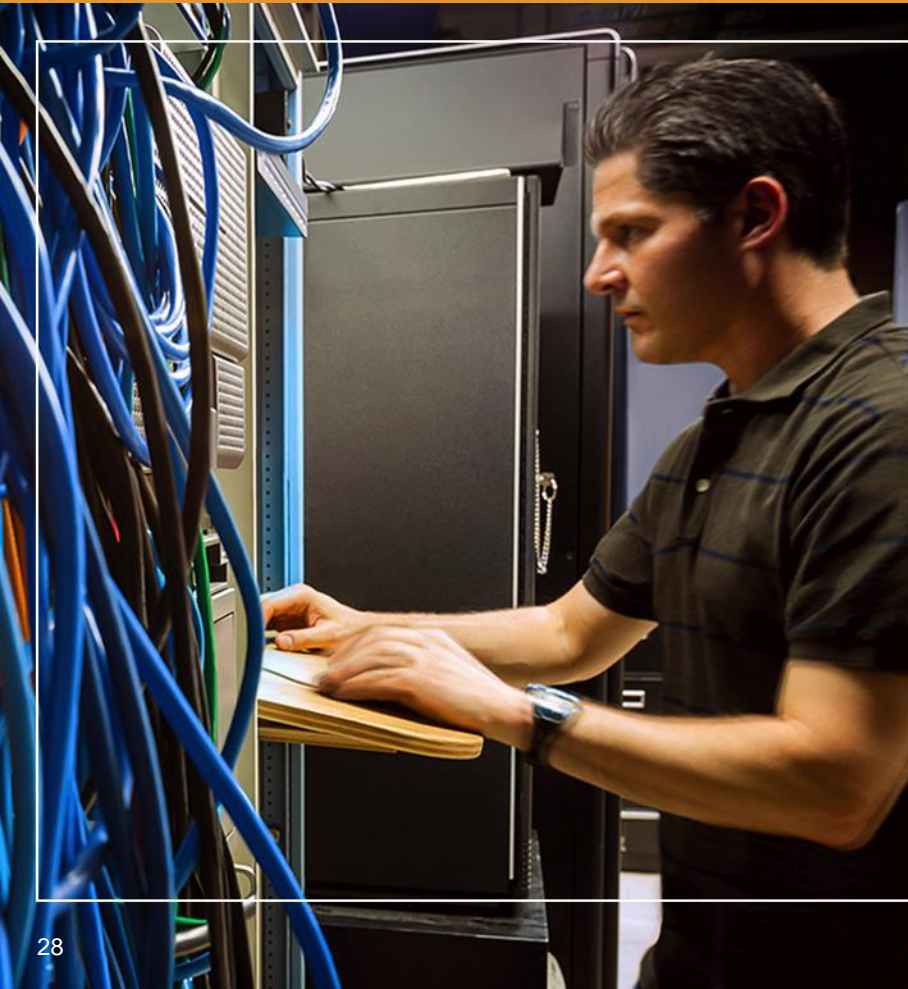
## IDENTITY THEFT

Identity theft is repeatedly the #1 consumer complaint category in America.

Identity theft manifests itself in many different ways:

- Credit fraud
- Social Security fraud
- Driver's License fraud
- Medical fraud
- Criminal/Character fraud
- Tax Return fraud





## IDSHIELD

### We Monitor What Matters

- Your Privacy
  - SSN
  - Date of Birth
  - DMV
  - Passport
  - Address
  - Email
  - Web persona
  - And more!
- Your Security
  - Bank accounts
  - Credit card
  - Loans
  - And more!



## IDSHIELD

### We Care

- Always Here for You
  - **24/7/365** emergency hotline
  - Unlimited non-emergency consultation
  - Free mobile app



PATRICK O.  
*Kroll Licensed Private Investigator*

## IDSHIELD

### We Restore Your Identity

- Team of Licensed Private Investigators
  - Do whatever it takes
  - As long as it takes
  - Clear your records for life
- \$5 Million Service Guarantee

**Kroll provides these identity theft services exclusively to IDShield members**



## IDSHIELD

- Security monitoring
- Privacy monitoring
- Quarterly credit score tracking
- Unlimited Identity Theft consultation
- Comprehensive Identity Restoration
- \$5 million service guarantee

Exclusions and limitations apply. Services and benefits vary by state/province. See [www.legalshield.com/fullplandetails](http://www.legalshield.com/fullplandetails) [and select your state/province] for specifics . Please review plan details for complete terms, conditions and exclusions before purchase.



## **IDSHIELD FAMILY PLAN —**

Family Pricing \$19.95/Group \$18.95

### Who's Covered

- The member
- The member's spouse
- Up to 8 dependent children up to the age of 18



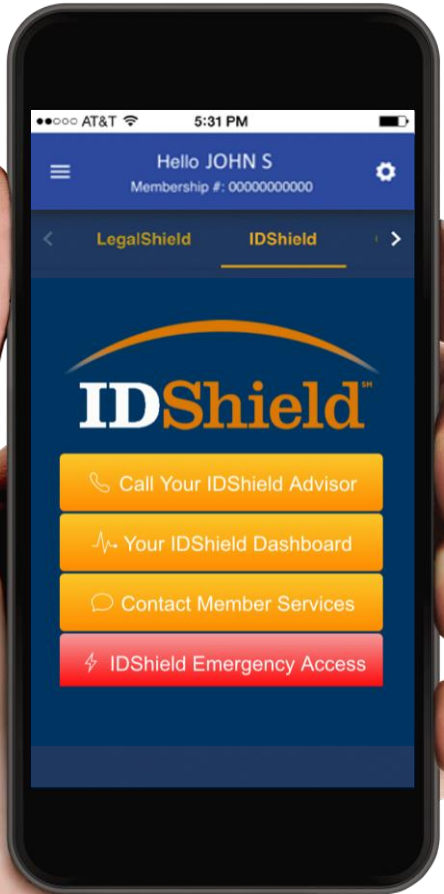


## **IDSHIELD INDIVIDUAL**

Pricing \$9.95/Group \$8.95/Large Group \$8.45

### Who's Covered

- Covers the individual member only



## TAP. CALL. EQUAL ACCESS.

- YOUR Law firm
- YOUR IDShield advisor
- OUR member services
- 24/7/365 emergency access (for covered items)



Download for free at the App Store or Google Play.

## WHAT'S RIGHT FOR YOU? NY

At LegalShield it's simple, you choose which plans work best for you and your family:

Product	Price Per Month	Group/Large Group Standalone	Group/Large Group Bundled
Family Legal Plan	\$15.95	\$15.95	\$15.95/\$15.95
Family IDShield	\$19.95	\$18.95/\$15.95	\$14.95/\$12.95
Total	\$35.90		\$30.90/28.90

## FAMILY LEGALSHIELD + INDIVIDUAL IDSHIELD NY

At LegalShield it's simple, you choose which plans work best for you and your family:

Product	Price Per Month	Group/Large Group Standalone
Family Legal Plan	\$15.95	\$15.95
Individual IDShield	\$9.95	\$8.95/\$8.45
Total	\$25.90	\$24.90/24.40

## MEMBERPERKS



**MEMBERPERKS**

## MEMBERPERKS

Monthly cost of LegalShield and IDShield Family Plan:

**\$39.90**



	Avg. Cost Per Mo.*	Avg. Savings Per Mo.*
Cell Service	\$130	\$10
Auto/Home Insurance	\$155	\$36



Cell Service

**\$130**

**\$10**



Auto/Home Insurance

**\$155**

**\$36**

Average monthly savings opportunities with MemberPerks:

**\$46.00**

## BENEFITS FOR EMPLOYERS

- It's expensive for a business to provide a discount program to its employees.
- LegalShield gives employers the ability to extend discounts and perks normally reserved for employees at large corporations.
- Included with a LegalShield or IDShield membership!
- No additional cost to employer.

## THE OPPORTUNITY IS HERE...

### We have:

- Unique and difficult to duplicate products
- Few competitors
- Clear advantages



## 4 WAYS TO EARN

1. Personal Sales Volume
2. Build a Sales Team
3. Residual Income
4. Incentives





## BUSINESS PLAN 1-50

Sales Title	Personal Sales Volume/Counters		
Executive Director	50/mo.	\$425.11	44.8%
Sr. Director	25/mo.	\$349.20	36.8%
Director	100	\$288.47	30.4%
Sr. Manager	50	\$242.92	25.6%
Manager	15	\$212.56	22.4%
Sr. Associate	7	\$182.19	19.2%
Associate		\$151.83	16.0%

\$79/mo.  
2 Counters

## GROUP LEGAL PLAN + IDSHIELD (FAMILY)

Sales Title	Personal Sales Volume/Counters		
Executive Director	50/mo.	\$216.84	58.4%
Sr. Director	25/mo.	\$178.12	48.0%
Director	100	\$147.14	39.6%
Sr. Manager	50	\$123.91	33.4%
Manager	15	\$108.42	29.2%
Sr. Associate	7	\$92.93	25.0%
Associate		\$77.44	20.8%

\$30.90/mo.

1 Counter

## BUILD A SALES TEAM TO EARN OVERRIDES

\$79 Plan

Monthly Qualification Positions	Executive Director	\$425.11	\$76	\$137
	Sr. Director	\$349.20		
Permanent Positions	Director	\$288.47	\$61	
	Sr. Manager	\$242.92	\$46	
	Manager	\$212.56	\$30	
	Sr. Associate	\$182.19	\$30	
	Associate	\$151.83	\$30	

## BUILD A SALES TEAM TO EARN OVERRIDES

\$30.90 Plan

Monthly Qualification Positions	Executive Director	\$216.84	\$39	\$70
	Sr. Director	\$178.12		
Permanent Positions	Director	\$147.14	\$31	
	Sr. Manager	\$123.91	\$23	
	Manager	\$108.42	\$15	
	Sr. Associate	\$92.93	\$15	
	Associate	\$77.44	\$15	

## RESIDUAL INCOME

- Residual Income rates range from 1.3% to 18.7%
- Residual income earned after first 12 months of membership
- Residual varies based on **Commission Level** at time of sale and **Monthly Retention Rate** of all memberships sold in that calendar month

**\$30.90**

plan sold as a Director  
with retention rate of  
**76%** earns **10.1%**



**Month after Month**  
**Year after Year**

for the life of the membership

## INCENTIVES

Fast Start qualification is not only your jump start to your LegalShield career but also your first month of qualifying for the Performance Club.

Continue earning 5 points each month

- Month **1** - Fast Start Qualify\*
- Month **4** - Special Recognition\*
- Month **8** - \$150 One-Time Bonus\*
- Month **12** - \$300 Monthly Bonus\*

**OR...**



\*See Performance Club brochure for all details and requirements.

## ENJOY ALL THE REWARDS OF THE PERFORMANCE CLUB.

You are eligible to **increase your monthly bonus to \$500** if you purchase or lease a qualifying **BMW**.



Each year LegalShield sends its top Associates on an exclusive trip to fantastic destinations.

The company also provides special contests and promotions through the year.

## Dedicated B2B Operations Team

**Group  
Services**

**Small  
Business**

**Broker  
Services**

B2B & CDLP Certification Training and  
Licensing Fees may also apply

## START UP FEE (YOU CHOOSE)

### Option 1: \$99

- Associate Portal
- Comprehensive Training
- Newsletter
- Onboarding Program
- Associate Perks
- Leadership Team
- **Plus \$20/month for LegalShield Advantage**

### Option 2: \$249

- Associate Portal
- Comprehensive Training
- Newsletter
- Onboarding Program
- Associate Perks
- Leadership Team
- **Includes first 12 months of LegalShield Advantage**





# LegalShield Advantage™

- Personalized Professional Websites
- Enhanced Associate Portal
- Lead/Contact Management System
- FranklinCovey® Personal Development Courses
- **Contests and Incentives**

LegalShield Advantage fees are \$19.95 per month (bank draft) or \$20.95 per month (credit card)

## BROKER/AGENCY CONTRACT AND COMMISSION OPTIONS

### Are you an Insurance Professional?

Contract and Commission  
Options are available for  
you, see a Broker Certified  
Associate for details.

LegalShield  
Worry Less. Live More.

Corporate Offices: One Pre-Paid Way  
Ada, OK 74820 • www.LegalShield.com  
800-654-7757

## Broker/Agency Application

To represent LegalShield as a broker/agency you must currently operate as a licensed insurance broker/agency with a minimum of 500 lives covered.

### Company Information

Applying as:  Company  Individual

Name \_\_\_\_\_

DBA (must match IRS records) \_\_\_\_\_

SSN/Tax ID# \_\_\_\_\_ Years established \_\_\_\_\_

Address Line One \_\_\_\_\_

Address Line Two \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Website \_\_\_\_\_

- Number of producers \_\_\_\_\_
- Contact name and title of producer working this agreement \_\_\_\_\_

• Lives Covered:  500 to 1,000  1,001 to 2,000  Over 2,000  
(If less than 500, producer/agency is not eligible to participate in our broker/agency program.  
Please talk to the person who introduced you to LegalShield about a direct sales position.)

• Current products offered:  Life/Health  Property/Casualty  
 Other voluntary employee benefits  Other

• Do you market to:  Individuals  Groups  Both

• In what states do you market? \_\_\_\_\_

• Are the licenses:  Individual  Agency  
List of licenses: \_\_\_\_\_

• Are you:  Captive  Independent

• Is this brokerage/agency or any of its producers currently or ever been an Associate of LegalShield? If yes, please provide that information.

## THANK YOU

### LegalShield

The information contained in this material is for illustrative purposes only and is not a contract. It is intended to provide a general overview of the legal plan benefits. Please remember that only the plan contract can give actual terms, coverage, amounts, conditions, and exclusions. Check benefit availability in your state/province.

Marketed by Pre-Paid Legal Services, Inc. dba LegalShield or applicable subsidiary:  
Pre-Paid Legal Casualty<sup>SM</sup>, Inc.  
In Florida: Pre-Paid Legal Services, Inc., of Florida  
In Virginia: Legal Service Plans of Virginia, Inc.  
Pre-Paid Legal Access, Inc.  
PPL Legal Care of Canada, Inc.

