



Commission Share Guidelines

Commission sharing can only be set up for group business or an individual Business Plan sale.

Up to 5 Associates may share commissions on group business, in any combination of whole percentages. Total of all shares must be 100%. Business Plans may only be shared 50/50. All parties in commission share must have a valid and active Associate/Broker number. All parties in a commission share will be authorized on the group.

In licensed states, LegalShield will verify a valid license for the Associate listed on the application or in the Commission Rule for web/electronic groups. In the event that only one Associate in the commission share has a current and appointed license for a particular state, that Associate must receive at least 50% of the commission, and must be the Associate soliciting the membership sale. All Associates, regardless of the commission share, must be licensed in Mississippi and Massachusetts to receive any commission.

Commission shares can be set up for all membership sales on a particular group or can be state specific. For example, Texas can be set up to share commission between 4 Associates at 25% each, while Arkansas is set up to share commissions 50/50 between two different Associates.

A Commission Share Agreement (attached) must be completed, submitted and processed by LegalShield **BEFORE** any group memberships are submitted for processing. Any memberships processed prior to the Commission Share Agreement being processed will not have the requested share applied to them. If submitting a Commission Share Agreement with a new group, please state "Commission Share" in the comments section of the Gold Card/Benefit Authorization Form.

The Commission Share Agreement must list all parties involved and must be signed by the Servicing/Designated Associate. The Commission Share Agreement is not required to share an individual Business Plan application.

To indicate a 50/50 commission share on a Business Plan, the two Associate numbers will need to be indicated in the Associate section of the application. Associate numbers should be labeled #1 and #2, with #1 always being the licensed associate in states where a license is required. Either associate may be certified to market Small Business Plans. Commission share will not be available for Business Plan memberships purchased on line.

A Business Plan processed on a group that has a commission share will have the group commission share applied and will override any commission share indicated on the Business Plan application.

Each Associate listed in the commission share will be able to view the membership information for any member for which they were paid. This will require **careful coordination** of servicing and/or conservation efforts as members will most likely not want to be contacted multiple times on the same subject.

Once a commission share is set up on a group, it is not necessary to submit multiple Group Report Sheets to indicate different Associates to receive credit for a member sale. The commission share will remain in place for all applications processed until the share is changed or canceled. To add or remove any Associate on a commission share will require a new commission share form submitted by the Servicing/Designated Associate.

All memberships submitted on a group will have the same commission share applied, regardless of how the membership is submitted (web, paper, electronic).

Commission share agreements on a group may be updated twice per 12-month period, unless there is a change in associate status as explained in the next paragraph.

Should an Associate listed on a Commission Share Agreement cancel or terminate their Associate Agreement, or should their state license expire, the commission share will not automatically re-adjust for the other Associates in the commission share and commissions will not be paid to the Associate canceled or terminated. The same would apply for adding new authorized agents on a group. The Servicing/Designated Associate will need to submit a new Commission Share Agreement to update and pay the appropriate parties prior to the processing of any new memberships.

Counters and Performance Club points will also be shared according to the Commission Share Agreement. For example, if the commission share is 50/50, each Associate will receive .50 counters and .50 PC points for each membership sale processed. If the membership is a dual counter membership, each Associate would receive 1 counter and 1 PC point. If the commission share is 50/30/20, the Associates would receive .50, .30, and .20 counters and PC Points respectively.

Qualifications for Executive Director, Performance Club, or any contest/promotion will NOT round up based on partial counters/points. Associates must meet or exceed the given requirement for qualification.

Full commission records will be created for each Associate involved in the commission share. If three Associates are involved, there will be three full sets of commission records for every membership sale. This could result in three unique and different upline Associates being paid, as well.

Renewal and override commissions will follow the commission share of the group. If an Associate's share of commission is 30%, renewals will be calculated based on that 30% advance or first year commission. The Associate receiving 30% will also generate 30% of the normal overrides to their upline.



Commission Share Agreement

In regards to any and all memberships sold within the group account stated below, I request that commissions be shared as described below. All parties have agreed that any expenses incurred in the marketing of memberships will be the responsibility of each individual party and are not included as a part of this Agreement. All parties additionally agree that membership counters and Performance Club points will also be shared as stated below. This Agreement should not be used for sharing commissions on Business Plan applications unless the Business Plan will be processed as part of the group. This Agreement to remain in effect until LegalShield is notified in writing by the Servicing/Designated Agent listed below.

Please note: Any applications processed prior to the processing of this Agreement will not be affected. Please be sure to verify processing of this Agreement prior to submitting applications for this group.

Group Name

Group # (if available)

Commission Share

The below section to be completed, listing all parties receiving a portion of the commissions, counters, and/or Performance Club points on the above group. If commission share is to apply to all member sales on the group please leave the state fields blank. If Commission share is to be state specific please complete a new form for each state. In states that require a license, the soliciting Associate/Agent/Broker must be properly licensed and appointed with LegalShield and must receive at least 50% of the commission share. Commission share must be whole percentages and total 100%.

NOTE: All Associates/Agents/Brokers must be properly licensed and appointed to receive any commission for members residing in MA and MS.

_____ to receive _____ % of commission in _____
(Please Print **SERVICING/DESIGNATED** Associate/Agent/Broker Name) (State)

_____ (Date)
(**SERVICING/DESIGNATED** Signature) (Date) _____
(**SERVICING/DESIGNATED** Associate/Agent/Broker #)

_____ to receive _____ % of commission in _____
(Please Print Associate/Agent/Broker Name) (Associate/Agent/Broker #) (State)

_____ to receive _____ % of commission in _____
(Please Print Associate/Agent/Broker Name) (Associate/Agent/Broker #) (State)

_____ to receive _____ % of commission in _____
(Please Print Associate/Agent/Broker Name) (Associate/Agent/Broker #) (State)

_____ to receive _____ % of commission in _____
(Please Print Associate/Agent/Broker Name) (Associate/Agent/Broker #) (State)

Comments/Notes:

