

Recognition award for team leaders

Identifying Information

Mr. Ms. Miss Mrs. Advocis ID

Applicant First Name _____ Initial _____ Last Name _____

Designations CFP® CLU® CH.F.C.® CHS PFA™ Other _____

Company Name _____

Street Address _____

City _____ Province _____ Postal Code _____ Telephone _____

Email address _____ Social Media Handle _____

Member and Company Status Information

Please check [] the following boxes where applicable:

1. I am a GAMA International Canada member in good standing. I understand that, in order to qualify for and be granted this award, I must maintain my membership in good standing for at least 12 months following submission of the award application.
2. Applicants must meet all general requirements. Applicants must be agency heads (first-line manager – District Manager or Branch Manager). **Only production from the applicant's district or direct unit will be counted.** Must personally supervise/ manage full-time career agents under direct team/supervision as of December 31, 2021.
3. Qualifying Production Requirements – Qualification is based on production of each agent/advisor from January 1, 2021 to December 31, 2021. Benchmark 1, measures average life premium sold. Benchmark 2, measures average new retail wealth annual premium sold. Benchmark 3, measures the number of new P&C policies sold.

NMLEA Award Criteria

Please check [] the Award Tier you are applying for:

Award Tier	<input type="checkbox"/> Bronze	<input type="checkbox"/> Silver	<input type="checkbox"/> Gold
Benchmark 1: Average new Life Premium issued per Agent/Advisor	\$42,000	\$45,000	\$50,000
Benchmark 2: Average new retail wealth new premium per Agent/Advisor	\$375,000	\$500,000	\$675,000
Benchmark 3: Total number of new P&C Sales (non-life or wealth)	700	800	950

Your overall award level will be determined by the average of the three categories.

Overall Category = the “average” of the three categories. Eg. If 2 of the 3 categories are Bronze, the Overall Category = Bronze. If of the 3 are Gold, the Overall Category = Gold. If each of the 3 categories are different, the middle category will determine the Overall Category. Eg. If Life is Bronze, Wealth is Silver and P&C new policies sold is Gold, the Overall Category = Silver

Eligible Product Inclusion:

- New Life Premium – Individual Life, Individual Critical illness, Individual Disability income contracts, Individual Long-term care, Life (group), Disability Income Contracts (group), Long term care (group), Critical illness (group)
- New retail Wealth Premium – Individual Segregated Funds, Group Segregated Funds, Individual Mutual Funds
- New Property and Casualty Sales – New Auto, Habitation, Farm and Commercial

Additional Information

If more than one company certification is required, this form should be photocopied and completed accordingly for each company showing the actual amount in #1, 2 and #3. It is the applicant's responsibility to obtain the certification from each company. Please mail all completed and certified application forms at one time to the GAMA International Canada Awards Administrator.

Application Date _____ Applicant's Signature _____

Company Certification

I certify that the requirements for items #1, #2 and #3 above as checked [] by the applicant are correct. If not, please complete the following information.

Date _____ Certifier _____

Company _____ Title _____

Certifier's Signature _____

Privacy Statement

Your privacy is important to us. Advocis collects, uses or discloses your personal information for the purposes identified in the Advocis Privacy Policy. Unless you instruct us otherwise, your personal information including email address and your telephone or fax number may be used for marketing, including telemarketing, 1) Advocis and TFAAC entity products and services and 2) third-party products and services that may be of interest to you. If you do not wish to receive any communications related to the marketing of Advocis and third-party products and services, please complete the web page in the members' website indicating your opting out choices. To view the Advocis Privacy Policy, visit www.advocis.ca.

Send Completed Form To

Mail: GAMA International Canada Awards Administrator
Advocis, 10 Lower Spadina Avenue, Suite 600, Toronto, ON M5V 2Z2

Email: gama@advocis.ca

Completed application must be dated and submitted no later than 11:59:59 p.m. eastern time Sunday, June 30, 2022.