



PREFERRED REWARDS



800.329.5799 | www.PIMSCO.com

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How It Works

\$5,000 Target Life Premium earns 1 point

\$50,000 Single Premium Life Insurance earns 1 point

\$50,000 Fixed Index Annuity premium earns 1 point

You can redeem your points in the Reward Marketplace located within your PIMSCO producer portal.





Let's Start Printing

5 Points

Support materials ranging from Business Cards, Notebooks and Pens to Private-Label Water Bottles, Embroidered Apparel and Executive-Style Classroom Materials, PIMSCO has a solution for you!

We'll work with our corporate identity vendors to create a custom package for you!



Retirement Analyzer Power Track Training

5 Points

If you are already working with the powerful Retirement Analyzer income planning software program, this advanced training program may be for you! With full service training and support, this intensive training goes through such topics as:

- Power Opening
- Fact Finder Process
- Solving Problems
- The Simple Explanation

Enrolling in the Power Track training commits you to three hours of training per week, for four weeks. We will work with your schedule to find a time that works best for you. If you are looking to take the sales process to the next level, the Power Track Training may be able to help you.



1500-Piece Direct Mail Package with "Mail Back" Postage Paid Response Card

6 Points

Direct Mail continues to be a popular strategy for finding prospective clients. With these packages, choose from any of our "off-the-shelf" direct mailers for quick implementation.

For this package you will get 1,500 of the predesigned:

- 4" x 5" Postcards
- With "Mail Back" Response Cards





Complete Customer Relationship Management “CRM” (For Any Size Team)

6 Points

If you are a producer, you need this!

Grow faster with one of the world's best CRM app's.

SalesForce can help you connect with customers like never before. On average, companies using Salesforce see:

- Increased Sales Revenue
- Better Lead Conversion
- Higher Client Satisfaction
- Fast and Easy Deployment

Best of all, SalesForce is easy to use and customizable to the way you work. Because it's all in the cloud, everyone can access the Sales Cloud with just an Internet connection — there's no need for expensive hardware or software.



Social Media Consultant Package

6 Points

This package includes an in-depth review of your online presence, with customized recommendations on how you can refine the mechanics of what you are doing. We will also include an hour-long session to review the suggestions and help you be more effective with your social media presence.

There are a number of tools and tips that can help in this medium and selecting this package will get you a personalized view.



Financial Professional Website (Just Add Your Picture)

8 Points

In the 21st century, having a website is just as, if not more important than having a fax machine and a cell phone. Without one, your business is simply operating at a disadvantage.

This package includes powerful features and educational, consumer approved content that will demonstrate your knowledge/experience and help you generate more leads.

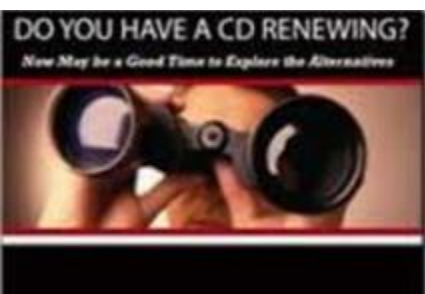
Retirement Analyzer Software Package

8 Points

Retirement Analyzer software users can easily and quickly help to provide answers to the following client questions:

- Can I continue my present standard of living into my retirement years?
- When can I retire without running out of money?
- How could my situation change during challenging economic times?
- How could it affect my family if I die prematurely?
- How could it affect my family if I enter a nursing facility?
- What are the possible solutions if my situation changes?

Choosing this package gives you access to the full array of agent information and resources for a 12-month period.



2,000-Piece Direct Mail Package with RSVP Service

8 Points

Direct mail continues to be a popular strategy for finding prospective clients. With these packages, choose from any of our “off-the-shelf” direct mail leads for quick implementation.

For this package, you will get 2,000 of the predesigned:

- 5.5” x 8.5” Postcards
- With RSVP Service



Power Up Program (Jump Start)

16 Points

Get Powered by PIMSCO

- Agent/Advisor Website (Fully Loaded)
- Business Forms (Let’s Print It Package)
- Client Email Campaign (100 Clients/12 months)

Don’t have a website because it’s just too much to manage?

The Web has revolutionized the way in which people collect and disseminate information. In the 21st century, having a website is just as, if not more important than having a fax machine and a cell phone. Without one, your business is simply operating at a disadvantage.



Preset Appointments

15 Points

By choosing this package, you can have a 3,000-piece mailer delivered to a qualified list of prospects.

This mailer offers a one-on-one dinner or lunch appointment. Responses from the mailer are handled by the vendor where they will pre-set the appointments.



Radio Consultant Package

20 Points

Receive a customized proposal from us on how to get a schedule of radio commercials on the air.

This package is flexible enough to be able to work in every market and can accommodate commercials of different lengths. It can also be across multiple stations and demographics

5,000-Piece Seminar Invitation Package

28 Points

This Rewards Package covers the cost of 5,000-piece wedding style mailers (printing/postage included) for an upcoming seminar of your choice.

- Includes RSVP Service

Whether you choose to use one of our pre-designed style(s), or work with our in-house advertising agency to custom create one; this package is a great way to help get you in front of more clients.

Power Up Program (Empire Package)

30 Points

By choosing this Preferred Rewards package, you will be branded within your community and everyone will know exactly what you do.

This includes a branded Advisor/Agent Website that is fully stocked with:

- Flip Books
- Videos
- Newsletters
- Learning Center with Financial Calculators
- Quote Request Forms
- Seminar Promotion and Registration
- Automatic Compliance Review for Registered Reps





Turn Key Seminar Package

36 Points

Let PIMSCO prepare you for your next Seminar!

This package is designed for producers who would like to present a seminar and insurance sales presentation to clients.

We will help manage the details, including:

- 3,000-piece invitation to clients in your preferred geographic location
- Choice of several Seminar Presentations (Consumer approved)
- Lunch or Dinner for attendees
- Appropriate collateral for the event

5,000-Piece Focus On Seminar Package

36 Points

This Rewards package is a must for building your business!

- Includes 5,000 Wedding Style Seminar Invitations
- Includes the Focus On Seminar (\$1,000 Value)

System Components:

- 66 full-color presentation images with sourced scripts
- A coordinated marketing campaign that includes a flyer, direct-mail letter, postcard, and invitation
- Access to result-producing dining invitations, letters and wave direct-mail packages
- 20-page, 4-color, personalized participant workbook
- Evaluation form
- Consumer Approved



DISCLAIMERS

- ✓ You must be contracted at GA level direct to PIMSCO.
- ✓ NY production does not qualify for Preferred Rewards.
- ✓ SPIA and MYGA premium does not qualify for Preferred Rewards.
- ✓ Variable Annuity production does not qualify for Preferred Rewards.
- ✓ Great American “Secure American” product over age 70 does not qualify for Preferred Rewards.
- ✓ Only 1st year commissionable annuity and target life premium qualifies for Preferred Rewards.
- ✓ Qualifying premiums must have been issued in the same year they are being redeemed. No exceptions.
- ✓ Annual Renewable Term Life Insurance does not qualify for Preferred Rewards.
- ✓ Only Allianz Life, American National, Banner Life, Equitrust, Foresters, John Hancock, Life of the Southwest, Lincoln Financial, Mutual of Omaha, North American, One America, Protective, Sagicor and Transamerica commissionable premium qualifies for Preferred Rewards.
- ✓ If you owe money to PIMSCO due to chargebacks, you do not qualify for Preferred Rewards.
- ✓ You are not eligible for Preferred Rewards while you have a Letter of Intent to transfer in/out of PIMSCO.
- ✓ If you intend on transferring out of PIMSCO, releases will be subject to a 6 month wait from the date of your most recent issued piece of business or last redeemed Preferred Reward, whichever is longer.
- ✓ Preferred Rewards does not apply to career/captive agents.
- ✓ Preferred Rewards are non-negotiable for any dollar value.
- ✓ Preferred Rewards are non-transferrable to any other person or agent.
- ✓ Incentive Rewards received are considered compensation which will be reported on form 1099-MISC for income tax purposes.
- ✓ PIMSCO reserves the right to change, alter, or discontinue the Preferred Rewards program at any time.

Please note that PIMSCO, Inc., its affiliated companies, and their representatives do not give legal or Social Security advice. Encourage your clients to consult with their attorney or the Social Security Administration via their local office or online at www.ssa.gov regarding their particular situation.

PIMSCO is not affiliated with or endorsed by the U.S. Government or any governmental agency.

Various state insurance regulations, as well as other state regulators prohibit the “gifting” of items, or inducements, which may include entertainment expenses, marketing or other activities by financial professionals in excess of a certain dollar value with some of those limits being as low as an annual aggregate value of zero dollars.

Be sure to check with your state’s requirements to ensure that you are complying with your specific state’s requirements and guidelines.

Registered representative participation is subject to Broker/Dealer approval.

PIMSCO is not affiliated with the 3rd party vendors used to fulfill any of the Preferred Reward incentives, nor do we guarantee the accuracy or quality of their services. Although we may promote and/or recommend the services offered by the companies, agents are ultimately responsible for the use of any materials or services and agree to comply with the compliance requirements of their broker/dealer and registered investment adviser (if applicable), insurance carriers they represent, and state regulations.

