



## PPI SOLUTIONS ADVANTAGE PROGRAM

### Advantage Program Qualification

The qualifying period for the program is the previous calendar year.

Qualification for the Advantage Program Member	Qualification for the Advantage Plus Member
<b>Insurance Focused Advisors</b>  \$30,000 of placed insurance FYC. Credit of \$1,250 for every \$1M of qualifying AUA to a maximum of \$10,000 (leaving a minimum of \$20,000 of placed insurance FYC to qualify)  <b>OR</b>	<b>Insurance Focused Advisors</b>  \$70,000 of placed insurance FYC. Credit of \$1,000 for every \$1M of qualifying AUA to a maximum of \$15,000 (leaving a minimum of \$55,000 of placed insurance FYC to qualify)  <b>OR</b>
<b>Investment Focused Advisors</b>  \$2.5M of new qualifying investment deposits. Credit of \$100,000 for every \$1,000 of placed Insurance FYC to a maximum of \$1M (leaving a minimum of \$1.5M of new deposits to qualify)	<b>Investment Focused Advisors</b>  \$3.5M of new qualifying investment deposits. Credit of \$100,000 for every \$1,000 of placed insurance FYC to a maximum of \$1M (leaving a minimum of \$2.5M of new deposits to qualify)

The Advantage Program is the property of PPI Solutions and members are encouraged to:

1. Abide by the PPI Code of Conduct
2. Maintain their supplier contracts with PPI Solutions
3. Abide by the PPI Solutions Advisor Agreement

Violation of any of these principles could result in removal from the PPI Solutions Advantage Program membership.

Qualifying funds under management are measured solely on total segregated funds on PPI Solutions' WealthServ Investments on the FundServ platform. GIC, Mutual Fund, Affinity and Bank products do not count.