



LEGACY HONORS®

Our Privilege—Your Rewards

## 2027 Legacy Honors Producer Conference

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### PROGRAM DETAILS AND RULES

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Legacy Honors is the rewards program that honors your dedication to serving your clients. As a member, you have the opportunity to become a top Producer and join Legacy for its 2027 Producer Conference, a peer-to-peer networking and educational event!

#### DATES AND LOCATION

- April 6–9, 2027  
The Lodge at Torrey Pines, La Jolla, CA

#### QUALIFICATION

- Qualification is by invitation only, based on top qualifying personal production premium submitted and paid between January 1, 2026, and December 31, 2026, on Legacy exclusive products currently open to new sales, with the exception of products issued by Integrity Life Insurance Company.
- Minimum personal production must be at least \$3 million in qualifying premium with a minimum of three applications during the eligibility period. On split cases, eligible Producers will get credit only for their portion of the premium.
- Qualifying Producers must be contracted with Legacy and in good standing. LOAs are not eligible.
- Qualification is complete only upon invitation. Qualifiers must confirm participation. If a qualifier is unable to attend, his/her invitation will be extended to the next qualifying Producer.
- Non-commissionable premium will not be included.
- Premium for canceled policies or qualifying premium resulting in a chargeback will not be included.
- Legacy reserves the right to exclude any products from this program that may be released in the future.
- All qualifier's primary business must be personal production, and they must be licensed, contracted with Legacy, appointed with one or more Legacy carrier partner, in good standing, and have no debit balances owed to Legacy at the time of the event.

#### TRAVEL AND EXPENSES

- Attendees will be reimbursed after the event for the cost of airfare, not to exceed a predetermined dollar limit for each Producer and guest.
- Attendees are responsible for arranging travel to and from the destination.
- Legacy will cover the costs of:
  - > Educational business sessions and industry expert guest speakers.
  - > Hotel accommodations (including sales tax) for each qualifier.
  - > All Legacy-sponsored activities and food events.

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### PROGRAM GUIDELINES

- Qualification credit is given to the Producer number(s) designated on the application.
- Qualification is complete only after the qualifier receives official notification from Legacy.
- Any Producer who qualifies, but for any reason does not attend, forfeits all rights and/or claims under this program.
- Participation in this event is nontransferable, and no cash or alternative payment will be awarded.
- Legacy is not responsible for event changes, postponement, or cancellation resulting from situations or events unknown to Legacy or outside its control.
- If the Producer cancels within 15 days of the event or fails to attend, he/she may be responsible for reimbursement of the cost of the event.
- This program is offered solely by Legacy Marketing Group®. Legacy, at its sole discretion, reserves the right to determine participant eligibility and revise or discontinue this program at any time.

### IMPORTANT TAX INFORMATION

- Producers are responsible for all federal/state income tax incurred as a result of qualifying for this program. The approximate value of the travel portion of this event will be reported as income earned on a Form 1099 for 2027. Legacy recommends that you consult a tax advisor regarding any tax ramifications as they apply to you.

Please contact the Marketing Field Support Team  
if you have any questions, 800-395-1053, Ext. 4002.



As an independent insurance Producer, you are ultimately responsible for complying with state and federal laws governing the marketing of insurance products, including annuities, and for avoiding any potential conflicts of interest when making product recommendations to prospective clients to ensure the product recommended is suitable and in the best interest of the client.