VIP Partner Status Process

Affiliate to Partner Path

1. Everyone Starts as an Affiliate

On the day they are appointed under VIP, every new person begins as an **Affiliate**. Case builds are available.

2. Intake — New Recruit Form (Completed by Executive Partner)

The EP selects the Recruiting Level:

Affiliate – With Partner Status Potential when earned	Megan creates a temporary @voluntarypartners.com group email that forwards to the affiliate's chosen inbox. Case builds available.
Affiliate – No partner track at this time	No group email. Standard affiliate status only.
Broker	Handled separately.

EP responsibility: You are responsible for properly explaining and training them on this process. Use the forwarding address as a carrot.

3. Partnership Offer Trigger (Transmitted Business Only)

Either/or:

- **3rd new Assurity case** transmitted, or
- **$25,000 Assurity AP** transmitted

4. Decision Rights

- The Executive Partner runs the process and has real autonomy (their team, their culture).
- Britton holds the final yes/no (his money).

5. If They Accept Partnership

- Full tech stack (full Google Workspace package + REPMOVE CRM)
- Assurity + Ameritas voluntary benefits
- Lyric virtual primary care for them and their family on day one (paid by Britton)
- Full contest, incentive, and award eligibility
- Invitation to Assurity home office trip (Ameritas possible)
- They own their cases and client data contractually

6. To Maintain Partner Status

- **$100,000 Assurity production** within 24 months from the date they become a partner.
- Miss it → return to Affiliate status after review by Britton + the Executive Partner.

7. Contests & Incentives

Partner status only. Affiliates have none. Contests are for culture.

This document defines the VIP Partner Status process. All training materials, system updates, and onboarding flows reference this page.