

PROBENEFITS CLIENT SEMINARS

Jason Cogdill, Presenter

ProBenefits is a frequent participant in broker and agency sponsored seminars geared toward broker business development, and we are pleased to consider speaking invitations for seminars. Our primary speaker is Jason Cogdill, in-house legal counsel, who has significant experience speaking on a wide range of benefits-related topics to various groups and organizations.

Our standard arrangements for seminars are:

1) **Eligible Brokers, Organizations, and Employers** – Speaking engagements are normally accepted for:

- a) Brokers with whom ProBenefits has an existing, substantial business relationship;
- b) Relevant professional organizations (such as benefits producers, accountants, CFO roundtables, HR organizations, banking organizations, legal organizations, etc.); and
- c) Employers with whom ProBenefits has an existing business relationship.

2) **Date** – To finalize a seminar date, contact Jason Cogdill (*contact information below*). We request that the event date be requested and agreed upon a minimum of 30 days in advance and confirmed in writing.

3) **Topic** – Jason Cogdill maintains a repertoire of timely presentation topics from which to choose. Please request a list of current presentation topics.

While our business demands do not always allow the opportunity for extensive customization of the presentation content, we will certainly consider any topic request and do our best to accommodate a request.

4) **Travel** – Jason will travel by car to destinations within 200 miles of Winston-Salem, NC. More distant locations may necessitate air travel and may involve an overnight stay.

5) **Expenses**

- a) ***Travel Expenses*** – Travel expenses in excess of \$150 must be reimbursed by the host. Expenses will be documented and submitted on ProBenefits' standard expense reporting form with supporting receipts. These receipts may include airfare, ground transportation, hotel, meals, and tips. We assure you that such expenses will be incurred with restraint, with an eye to practicality rather than luxury.

b) ***Speaking Fee*** – A speaking fee may be negotiated, based in part upon the business potential of the audience, business relationship with the broker, preparation, travel, and time involved.

6) **Presentation Equipment** – Presentations are typically done by PowerPoint, projected using a laptop computer and LCD projector. When travel is by car, ProBenefits can supply presentation equipment, except for a screen for viewing. When travel is by plane, or where the host has the ability to set up for projection, ProBenefits requests setup utilizing a laptop computer with USB port and LCD projector with remote control. If a microphone is needed, the host should make this arrangement.

7) **Confirmed Attendees** – At least 10 days prior to the event, ProBenefits requests that the host verify the confirmed reservations of at least 15 attendees, thereby validating the business viability of the event. In the event of insufficient attendance, a \$250 speaking fee will be due as compensation for time invested, plus full travel expenses incurred.

8) **Handout Material** – Unless otherwise arranged, ProBenefits will prepare and provide an appropriate number of copies of all handout material.

9) **Presentation Media** – Slides and handout material may not be distributed without written permission from ProBenefits. The visuals and handout material contain proprietary material developed at considerable expense and are deemed privileged information.

10) **Broker References** – Upon request, we will be pleased to provide broker references attesting to the value of ProBenefits seminars, as well as providing helpful feedback and practical tips for scheduling and conducting a successful event.

For a biography of Jason Cogdill or any ProBenefits presenter, or for any additional information about ProBenefits seminars, please submit a request to ProBenefits via the contact information listed below.

11) **Contact Information** – If you have any questions or wish to inquire about a presentation by ProBenefits, please contact Jason Cogdill, Corporate Counsel (888-722-8382, ext. 132, direct dial 336-714-8012, email jason@probenefits.com) or Gary Knight, Executive Vice-President (888-722-8382, ext. 124, direct dial 336-714-3990, email gknight@probenefits.com).