

Rules and Restrictions for Loyalty Program

The following rules and restrictions shall apply to the Insperty Loyalty Program.

\$100 Loyalty Payment

For you to be eligible for the \$100 loyalty payment, the company you refer (i) must not be a current Insperty® client or customer of any kind; and (ii) must have an initial meeting with an Insperty Business Performance Advisor and a Company Leader of the referred company. A “Company Leader” is a C-level executive (CEO, CFO, COO), president, or a member of the referred company’s board of directors.

\$500 Loyalty Payment

To be eligible for the \$500 loyalty payment, a referred company must be a new Workforce Acceleration customer and cannot be an Insperty® Workforce Optimization® or Workforce Synchronization™ client at the time of the referral and must complete its first payroll using the iSolved® application for at least 5 active employees.

\$500 Loyalty Payment

To be eligible for the \$500 loyalty payment, a referred company must be a new Insperty Workforce Optimization or Workforce Synchronization client and complete its first payroll with the Insperty Workforce Optimization or the Workforce Synchronization solution, as applicable, with 5-9 full-time employees. Referrals for any individual Insperty business performance solution, Workforce Acceleration solution, or any other Insperty bundled service offering are not eligible for the \$500 loyalty payment.

\$2000 Loyalty Payment

To be eligible for the \$2,000 loyalty payment, a referred company must be a new Insperty Workforce Optimization or Workforce Synchronization client and complete its first payroll with the Insperty Workforce Optimization or Workforce Synchronization solution, as applicable, with 10 or more full-time employees. Referrals for any individual Insperty business performance solution, Workforce Acceleration solution, or any other Insperty bundled service offering are not eligible for the \$2,000 loyalty payment.

Additional Promotional Loyalty Payments

Insperty may also offer additional promotional loyalty payments from time to time in its sole discretion. The terms and conditions contained in the materials for such promotional offerings shall apply in addition to the terms contained herein. The terms contained in such promotional offering shall control over the terms contained herein in the event of a conflict.

Payments of Loyalty Payments

Loyalty payments can only be paid to one person or entity. Payments cannot be split between multiple payees. Referrals that are eligible for payments under the Insperty Channel Agreements or any other similar agreement that compensates a person or entity for such referral, shall not be eligible for any payments.

Please allow up to a month from the time of the initial meeting eligible for the \$100 loyalty payment, or from the time the referred company runs their first payroll as an Insperty Workforce Optimization, Workforce Synchronization or Workforce Acceleration client to receive your loyalty payment as applicable for the \$500 and greater loyalty payments. Loyalty payments may be made by an Insperty-issued check or by any other method chosen by Insperty. Loyalty payments are considered taxable payments made for qualified referrals under the Insperty Loyalty Program and will be reported via an IRS Form 1099-MISC where required by IRS regulations. All tax obligations related to such loyalty payments are the sole responsibility of the person or entity receiving funds under the Insperty Loyalty Program.

The following additional terms shall apply for any person who has previously received loyalty payments preloaded to the Insperty® ExpensAble® Plus Prepaid Mastercard® (“ExpensAble Plus card”). The funds for the \$100 ExpensAble Plus cards are valid for 6 months from the date of receipt, and the funds for the \$500, \$1,000 and \$2,000 ExpensAble Plus cards are valid for one year from the date of receipt. The cards are reward cards issued for loyalty purposes and are intended to solely be used by the recipients. The cards are not transferable and are not intended for gift-giving purposes. To view our full cardholder terms and conditions applicable to the ExpensAble Plus cards, [click here](#). To view our frequently asked questions, [click here](#).

Insperty corporate employees. In order to be eligible for a referral payment, Insperty corporate employees must submit a referral through the Insperty referral website located at insperty.com/loyalty. Failure to submit a proper referral will result in forfeiture of any payment. Insperty corporate employees who have access to change coding or initial coding within the system of record (i.e., solutions, loyalty advisors, sales operations and technology, district administrators and any other employee with such access) are not eligible to receive a referral payment.

Additional Charitable Donation

As applicable, in addition to earning a loyalty payment as noted above, Insperty will make a charitable donation to a charitable organization for which the person making the referral is an employee, volunteer, or member of such charitable organization’s board of directors (“Your Charitable Organization”). If you earned a \$100 loyalty payment for an initial meeting, Insperty will make a \$100 donation to Your Charitable Organization. If you earned a \$500 loyalty payment for referring a Workforce Optimization client, Insperty will make a \$250 donation to Your Charitable Organization. If you earned a \$2000 or more loyalty payment for referring a Workforce Optimization client, Insperty will make a \$1000 donation to Your Charitable Organization. The \$500 loyalty payment for referring a Workforce Acceleration client is not eligible for the additional charitable donation. To be eligible, Your Charitable Organization must be a non-profit and tax-exempt charitable organization as described in Section 501(c)(3) or 170(c) of the Internal Revenue Code and must furnish information requested by Insperty concerning evidence of its tax-exempt status before the charitable donation will be paid. Additionally, Insperty reserves the right in its sole discretion to refuse to make contributions to non-profits that it deems controversial or that it deems not in Insperty’s best interest.

Changes to these Rules and Restrictions

Insperty reserves the right to change the eligibility requirements or any other term of this Insperty Loyalty Program at any time without notice. Insperty may discontinue the Insperty Loyalty Program at any time in its sole discretion. These rules and restrictions were last updated on July 17, 2018.