

Strength Through Teamwork

Association Marketing



Mutual of Omaha's Association Marketing Requirements

- **Point of Contact** – Your Sales Director will be your point of contact. He or she will be able to help answer any questions you may have regarding requirements or the set up process.
- **Proposal Request** – The marketing plan and association bylaws must be submitted with the original proposal.
- **Exclusivity** – The association discount is exclusive to the marketer and/or producer who submits the proposal first.
- **Application Processing** – Applications won't be processed with the discount unless the approved group number is listed on the applications. This number will be provided by your Sales Director once they receive approval.
- **Production Requirement** – A minimum of 12 applications must be issued annually or the agreement with the association will be terminated.

Proposal Request Guidelines and Process

Please review these guidelines before submitting a proposal request.

Association Approval Requirements

An organization must:

- Have at least 100 members
- Have been in existence for at least two years
- Have bylaws and officers
- Have members who pay dues or fees on a regular basis and vote on officers and matters of policy

An organization will not be eligible for the program benefits if it is:

- Formed for the purpose of obtaining insurance
- Formed to promote political views
- Primarily consisting of members with hazardous occupations
- Social or religious in nature

The home office reserves the right to final approval or disapproval of all association group requests based on product, underwriting and marketing assessment of each group's fit for the program.

Association Approval Process

