Allegiance TITLE COMPANY

MARKETING, ADVERTISING & SPONSORSHIP APPROVAL FORM

*(Please complete **ALL** pages)*

Please refer to the Sales & Marketing Standards (Do's & Don'ts) and get the approval of your, Sales, Branch or Department Manager (as applicable) BEFORE submitting both pages of this form to corporate for final approval. You must complete these forms BEFORE agreeing to engage or engaging in any advertising, sponsorship, event or marketing-related activity. When in doubt of any guidelines or procedures, contact one of the executive team members.

Name:		
Branch Address:		
City:	State:	Zip:
Phone:		
Fax:		

Advertising/Sponsorship/Event/Marketing Activity Proposal & reason for participation:

TOTAL $ AMOUNT OF AD/SPONSORSHIP/EVENT/MARKETING ACTIVITY $ _____

(The proposed total $ amount MUST be completed.)

MANAGER APPROVAL REQUIRED BELOW

MANAGER'S APPROVAL: _____

Date: _____

EXECUTIVE APPROVAL: _____

Date: _____

This form, along with all necessary accompanying documentation should be emailed to Keith Donovan: kdonovan@allegiancetitle.com.

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(Page Two - **SUPPORTING INFORMATION***)*

The information below is needed to comply with our auditable records requirement. Please provide as much information as possible when submitting the initial request for approval. Omission of information could result in a delay in approval of your request. Any "Additional Materials" identified below that are needed to demonstrate compliance with the auditable records requirement but that are not available at the time of initial request may need to follow post-event.

For the purposes of this form, the term "Producer" means any person in a position to refer business to Allegiance Title.

KEY QUESTION SURVEY:

☐ Yes	☐ No	☐ N/A	Is the request for sponsorship solicited by a Producer?
☐ Yes	☐ No	☐ N/A	Does the sponsorship/advertisement involve any co-branding with a Producer?
☐ Yes	☐ No	☐ N/A	Does this seminar provide for continuing education credit?
☐ Yes	☐ No	☐ N/A	Have we participated in this event/marketing piece in the past?

ADDITIONAL MATERIALS:

If there is a cost involved for this request, please check and provide supporting detail for all of the following that apply:

- ☐ Check Request form attached
- ☐ Documentation of the request from the solicitor
- ☐ Detail of benefits received for cost charged
- ☐ Agreement
- ☐ Application, Registration or sponsorship
- ☐ Copy of Sample Advertisement *(i.e. ad/video commercial, etc.)*
- ☐ Emails
- ☐ Budget of the sponsored event
- ☐ List of Attendees at event
- ☐ Invitation *(if applicable)*
- ☐ Program *(if applicable)*
- ☐ Flyers
- ☐ Pictures of Advertising at the event *(example – banner, easel display board, billboard, etc.)*
- ☐ Other:

COMPARABLE INFORMATION:

Determination of fair market value for advertising. Please provide advertising cost sheet.

☐ Yes ☐ No Are these rates for advertising offered to every advertiser on a non-exclusive basis?

CHARITABLE ORGANIZATIONS: *(If a donation is being made, then the below information MUST be provided)*

- ☐ 1. IRS determination letter *(legally recognized charity)*
- ☐ 2. Sales & Use Tax Exemption Certification
- ☐ 3. Written Confirmation that all proceeds will benefit the organization

Please allow one week from date of submission of initial request and all related supporting documentation for approval.

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