



Frequently Asked Questions

The Affinity business unit within LegalShield Business Solutions is dedicated to achieving membership growth for the company through member based sales. One of the ways we do this is by partnering with the field to provide guidance and, in some instances, corporate resources to help an Associate onboard and manage an Affinity partnership.

What does “Affinity” mean?

Merriam-Webster’s defines this term as: 1. A habitual attraction to some activity or thing; 2. The fact or state of having something in common.

When used in the business context we consider a group or organization comprised of people that are linked by a common bond as having an affinity for each other and their organization. For example, occupational affinity (Association of accountants), or a cause affinity (Red Cross members), or demographic affinity (AARP).

Why is “Affinity” a good place to look for business?

One of the challenges in selling professional services is finding ways to connect with large groups of potential clients and referral sources. A good starting point is to identify some activity that you enjoy (i.e. one that puts you in contact with potential customers). It doesn’t matter if its sports, religion, politics or hobbies. Your interests can make it easier to build your referral network because it gives you a more natural way to connect with people.

What qualifications do I need as an Associate to pursue an Affinity partnership?

To launch an Affinity partner, the Associate must have:

- 250 Personal Sales with 3 Groups opened OR
- be Broker Qualified OR
- have a B (Broker) or V (General Agency) Division Code

Exceptions may be made at the sole discretion of LegalShield including but not limited to the following:

- A qualified up-line or team member willing to work with the Associate

What types of partnerships fall under the Affinity business unit?

There are 4 types of partnerships:

1. Corporate Managed
2. National Employee Account
3. Affinity (Local organizations, associations, Chambers of Commerce, etc)
4. Finders Fee (non-employer)



How do the 4 types of partnerships differ?

A *Corporate Managed* partnership is a national Affinity partnership managed out of the corporate office.

A *National Employee Account* partnership is an employer that provides us access to their employees without going through a benefits broker. These employers have multi-state operations with over 2,000 employees.

An *Affinity* partnership is usually a local organization or association that will include LegalShield offers in their marketing to their members along with face to face presentations.

A *Finders Fee* partnership involves an agreement with an individual that can provide you access/introductions to decision makers within an organization or association who will allow you to set up face to face presentations with their members.

What is the compensation arrangement between the Associate, the Partner and Corporate?

It usually does not cost you anything additional to work with an Affinity partnership but the revenue paid to the partner comes out of the Associate's commission. The impact to your commission and the revenue to the partner will vary based on the type of partnership.

What are the requirements to receive corporate resources?

Like you, corporate has limited resources and we need to use those resources for the best opportunities. Size of the opportunity and the ability to create a robust marketing plan are necessities. That means the bigger the group the better, preferably several hundred thousand customers or employees. We also need to be sure there are several marketing channels that we can utilize to educate their customers or employees.

What if my Affinity partnership is not large enough for corporate support or doesn't fit with current corporate initiatives?

Dedicated phone consultants are there to help you through the process and more help is coming soon. The Affinity team is creating a process called Affinity in a Box to assist Associates in on-boarding and maintaining Affinity partnerships. We will combine Affinity sales training with a marketing toolkit that Associates can use to help them create, implement and manage Affinity partnerships. Be on the lookout for upcoming announcements to learn more!



Affinity In A Box is just what I have been waiting for. Until it is launched, how can I create new Affinity partnerships?

Review the Affinity How To Guide posted on the back office.

An *Affinity* partnership is usually a local organization or association that will include LegalShield services in their marketing to their members along with face to face presentations.

If you feel this fits your situation, then download the Affinity Info and Clearance form ([Word](#) | [PDF](#)). Once you've gathered all the information, email the completed form to Affinity@LegalShieldCorp.com. If you have any questions along the way, please contact Broker Services at 580.436.7577.

A member of Broker Services will contact you within 10 business days of submitting the completed questionnaire.

A *Finders Fee* partnership involves an agreement with an individual that can provide you access/introductions to decision makers within an organization or association who will allow you to set up face to face presentations with their members.

If you feel this fits your situation, then download the Finders Fee Info and Clearance form ([Word](#) | [PDF](#)). Once you've gathered all the information, email the completed form to FindersFee@LegalShieldCorp.com. If you have any questions along the way, please contact the New Accounts in Group Services at 580-310-6897.

A member of the New Accounts team will contact you within 10 business days of submitting the completed questionnaire.