



Email: verge@vergeinsurance.com

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Verge Insurance Client Referral Form

Date of Referral (mm/dd/yyyy):

Client Details (your personal information):

First Name:	Email:
Last Name:	Phone Number:

Referral Details (you may refer up to 5 unique people each month):

Referral #1

First Name:	Phone Number:
Last Name:	

Type of Insurance:

Personal – Auto

Personal – Home

Commercial

Life

Group Benefits

Comments:

Referral #2

First Name:	Phone Number:
Last Name:	

Type of Insurance:

Personal – Auto

Personal – Home

Commercial

Life

Group Benefits

Comments:

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Referral #3

First Name:	Phone Number:
Last Name:	

Type of Insurance:		
Personal – Auto <input type="checkbox"/>	Personal – Home <input type="checkbox"/>	Commercial <input type="checkbox"/>
Life <input type="checkbox"/>	Group Benefits <input type="checkbox"/>	

Comments:

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Referral #4

First Name:	Phone Number:
Last Name:	

Type of Insurance:		
Personal – Auto <input type="checkbox"/>	Personal – Home <input type="checkbox"/>	Commercial <input type="checkbox"/>
Life <input type="checkbox"/>	Group Benefits <input type="checkbox"/>	

Comments:

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Referral #5

First Name:	Phone Number:
Last Name:	

Type of Insurance:

Personal – Auto Personal – Home Commercial
Life Group Benefits

Comments:

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Referral Program Rules and Regulations:

Referral Program, General:

1. To participate in the Referral Program, Referrers should follow the instructions and fill out the Verge Insurance Client Referral Program Form by entering their contact information in the relevant fields.
2. Individuals who receive a referral via a Referrer are “Friends” (or, singly, a “Friend”).
3. Referrers who follow the instructions and fill out the form in the relevant fields may receive “Reward(s)” for every “Qualified Referral”.
4. By participating in the Referral program, a Referrer represents that he or she gives consent to provide their contact information.

Eligible Referrer

1. To be “Eligible”, a Referrer must:
2. Be a current client at Verge Insurance Group; and
3. Be at least 18 years old.
4. Not a current Verge Insurance Group staff member

Making a Referral:

1. A Referrer must fill out the Verge Insurance Client Referral Program Form with the relevant information. Once a Referrer refers to a Friend, he or she will be sent a confirmation email.
2. Referrers must respect the spirit of the Referral program by only referring to real individuals who meet the requirements of the Program. Referrers may not refer themselves and may not create multiple or fake accounts to participate in the Program.

Qualified Referrals:

1. A “Qualified Referral” means that all the above conditions are met.

Earning Rewards:

1. A Referrer shall receive one (1) reward per Referred Friend in the form. A maximum of five (5) Friends can be referred to each month.
2. Rewards may be redeemed in the form of a \$25 Amazon gift card. Restrictions may apply.