



# Employee Referral Program

## Program Guidelines

Effective January 1, 2023, through December 31, 2023, a referral bonus of **up to \$4,000** will be paid to an employee who refers a candidate hired between January 1 and December 31, 2023, per the below eligibility and referral criteria. This referral program applies to non-production positions, Select Producer positions and Personal Risk Producer positions. For information on referral programs for other production roles, please refer to the [Producer Referral Program Summary](#) located on the intranet.

**Bonus payments will be determined in the Company's discretion and paid in accordance with the following schedules:**

### Open Positions (excluding Career Track/Early Talent):

Phase 1	\$1,500	Upon completion of the new employee's first 30 days of employment
Phase 2	\$2,500	Upon completion of the new employee's first 6 months of employment
<b>Total Potential Bonus</b>	<b>\$4,000</b>	

### Career Track/Early Talent Positions:

Phase 1	\$1,000	Upon completion of the new career track employee's first 30 days of employment
Phase 2	\$1,000	Upon completion of the new career track employee's first 6 months of employment
<b>Total Potential Bonus</b>	<b>\$2,000</b>	

## Bonuses

Referral bonuses will be calculated in the Company's discretion and paid as soon as possible once validation criteria are successfully met. Bonuses will be administered by the hiring region, through USI payroll, and will be subject to all appropriate tax withholdings. Referring employees must be actively employed by USI at the time the referral bonus payment is due to be made to receive such payment.

## Eligibility

All employees are eligible to participate in the program with the following exceptions: Corporate/Regional Executives; Practice Leaders, Regional Operations Leaders, the Hiring Manager, Recruiters and Human Resources.

## Referrals

An eligible referral is one that is accompanied by a referral application form. It must include a copy of the potential employee's resume and/or a personal introduction. Referred candidates may not already be active in the database or have been previously referred. The program excludes payment for the referral of intern, temporary, and part-time employees. Former USI employees and family members are not considered eligible referrals.

If you have a candidate that you would like to refer for consideration and would like to be eligible for this program, you must forward VIA EMAIL the candidate's name, contact information, and resume to your Regional HR Representative with a copy to your Regional CHRO. A form is attached for this purpose. Providing this to the Regional CHRO provides a date stamp for each referral. (If you fail to send this email and another referral for the same name is received from any other source, your referral will not be valid.)

**This program replaces all existing regional referral programs unless otherwise approved in writing by the Corporate SVP and Chief Human Resources Officer. Any eligible referrals made prior to January 1, 2023 for which a bonus referral payment is due but has not yet been paid as of such date, will be calculated and paid in accordance with the applicable referral program in effect at the time of such referral.**



APPLICATION FORM  
Employee Referral Program

Referring Employee's Name:

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Referring Employee's Title:

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Referring Employee's Region/Location:

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Name of Referral Applicant:

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Contact Information of Referral Applicant:

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Resume Attached

Business Card Attached

Personal Introduction Arranged

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***This section to be completed by receiving HR representative.***

Date/Time Referral Received:

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Signature Verifying Receipt:

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