Integrity Marketing Materials

Your guide to using marketing assets effectively

These marketing materials are designed to help you serve your clients and grow your business. Using the assets in line with carrier and CMS rules helps to ensure compliance — and success!

How to Use Marketing Materials

Use this guidance for using Integrity marketing materials:

1. Save the file(s) to your local device, then open each one you'd like to use.
2. Note any fields that need to be filled in by YOU. These are typically in [brackets] and may include:
   - Name, phone number, email address, website or business address
   - Number of carriers represented and products offered (for the CMS TPMO disclaimer)
   - Other fields that personalize the piece for the recipient
3. Each type of asset may have additional variables that you'll need to personalize:
   - **Social media posts:** your business name and contact info
   - **Printable mailers:** the greeting, your contact info and your photo
   - **Flyers:** your contact info
   - **Emails or letters:** personalization for the recipient and your contact info
4. Once you've customized your materials, save your changes and get ready to use!

CMS Compliance Changes

NOTE: CMS regulation changes happen frequently. Integrity marketing materials are reviewed for current compliance practices, but it's still your responsibility to remain compliant in your communications, no matter where you've sourced your materials from.

Your name and the title, "Licensed Insurance Agent," are required on all pieces for CMS compliance. Check with your internal compliance officer to verify your materials are within current compliance regulations.

Integrity and its partner organizations are not responsible for any violations, sanctions or disciplinary actions imposed on agents or agencies for use of materials. Agents and agencies are ultimately responsible and accountable for use of any materials.

Questions?

Contact your upline for further compliance guidance.

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