

# UP VANGUARD INSURANCE SUBSIDY

DUTY. HONOR. COUNTRY.





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The UPVI will now be able to grant insurance subsidies and purchase a group life insurance for Vanguarders in good standing, through referral fees and donations coming from partner insurance agencies.

## OBJECTIVES

- Increase number of Vanguarders in Good Standing
- Increase attendance to Vanguard Activities
- Additional source of income for OPEX
- Provide Life, Critical illness and Accident Insurance to Active Vanguarders





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- 1. The UPVI will grant financial subsidies to insurance purchases of all Vanguards in good standing.
- 2. The UPVI will purchase a Group Life Insurance policy and will include all insurable Vanguards who are in-good standing and who have attended at least 6 Chapter Meetings during the past Vanguard Year.

Under Article 1, Section 1H, of the by-laws of the UPVI,  
“A member in good standing shall be a member who has no monetary obligation with the Corporation for the current and immediately preceding year.”





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### Estimates of Financial Subsidies

- 8% of HMO / Medical Insurance cost
- 15% of Car Insurance cost
- 15% of Fire and Property Insurance cost
- 15% of Home, Condo, or Business Insurance premiums
- 15% of Retirement Plan premiums
- 15% of Educational Plan premiums
- 25% of Critical Illness Coverage premiums
- 25% of Life Insurance premiums

- \* in cooperation with select insurance agencies
- \* Subsidies can be higher depending on the brand

Current brands available for the subsidies:



More brands will be available in the coming months





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### GUIDELINES FOR AVAILMENT

1. Fill-out Application Form.
2. A Portfolio Manager will contact you the soonest .
3. Pay for your selected insurance products.
4. Send receipt / proof of purchase to Finance Committee [finance@upvanguard.org](mailto:finance@upvanguard.org)
5. Finance Committee will send you the financial subsidy (thru check/cash/deposit to your bank account, or donate to any UPVI Project)
6. Family members up to first degree of consanguinity are included in the subsidy.
7. For Property insurance, property should be under the name of the Brod or the immediate family.





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## REFER INSTITUTIONAL CLIENTS TO HELP INCREASE OUR OPEX AND INSURANCE SUBSIDY FUNDS

Our insurance agency partners  
will be donating to our  
**Insurance Subsidy Fund**  
**OPEX Fund**

for all individual purchases and for  
every successful institutional client referrals.