

Rules and restrictions for Middle Market National Accounts

The following rules and restrictions apply to the Insperity Middle Market National Accounts Loyalty Program.

Insperity encourages you to provide referrals of small to medium size businesses who may benefit from Insperity's products and services. Referrals to Insperity should be submitted at <https://hr-solutions.insperity.com/mm/mmna-referral>. Insperity will provide you with one or more "loyalty payments" for your referrals and for referrals who become Insperity clients, subject to the specific rules set forth below."

\$500 LOYALTY PAYMENT

If a company is being referred, to be eligible for a \$500 loyalty payment, the referred company must become a new Insperity Workforce Acceleration client with 5 or more full-time employees and complete its first payroll with Workforce Acceleration.

\$1,000 LOYALTY PAYMENT

If a company is being referred, to be eligible for a \$1,000 loyalty payment, the referred company must become a new Insperity Workforce Optimization client with 5-9 full-time employees and complete its first payroll with Workforce Optimization. Referrals for any individual Insperity business performance solution, Workforce Acceleration solution, or any other Insperity bundled service offering are not eligible for the \$1,000 payment.

\$3,000 LOYALTY PAYMENT

If a company is being referred, to be eligible for the \$3,000 loyalty payment, the referred company must become a new Insperity Workforce Optimization client with 10-24 full-time employees and complete its first payroll with Insperity Workforce Optimization. Referrals for any individual Insperity business performance solution, Workforce Acceleration solution, or any other Insperity bundled service offering are not eligible for the \$3,000 payment.

\$4,000 LOYALTY PAYMENT

If a company is being referred, to be eligible for the \$4,000 loyalty payment, the referred company must become a new Insperity Workforce Optimization client with 25-49 full-time employees and complete its first payroll with Insperity Workforce Optimization. Referrals for any individual Insperity business performance solution, Workforce Acceleration solution, or any other Insperity bundled service offering are not eligible for the \$4,000 payment.

\$5,000 LOYALTY PAYMENT

If a company is being referred, to be eligible for the \$5,000 loyalty payment, the referred company must become a new Insperity Workforce Optimization client with 50 or more full-time employees and complete its first payroll with Insperity Workforce Optimization. Referrals for any individual Insperity business performance solution, Workforce Acceleration solution, or any other Insperity bundled service offering are not eligible for the \$5,000 payment.

ADDITIONAL PROMOTIONAL LOYALTY PAYMENTS

Insperity may offer additional promotional loyalty payments from time to time in its sole discretion. The terms and conditions contained in the materials for such promotional offerings shall apply in addition to or in lieu of the terms contained herein.

The terms contained in such promotional offering shall control over the terms contained herein in the event of a conflict.

PAYMENTS OF LOYALTY PAYMENTS

Loyalty payments may only be paid to one person or entity. Payments may not be split among multiple payees. Referrals that are eligible for payments under Insperity Channel Agreements or any other similar agreement that compensates a person or entity for a referral, are not eligible for payments under the Middle Market National Accounts Loyalty Program.

Please allow about a month from the time the eligibility for the award is triggered, to receive payment. Loyalty payments may be made by an Insperity-issued check or by any other method chosen by Insperity. Loyalty payments are considered taxable payments made for qualified referrals under the Insperity Loyalty Program and will be reported via an IRS Form 1099-MISC where required by IRS regulations. All tax obligations related to such loyalty payments are the sole responsibility of the person or entity receiving funds under the Insperity Middle Market National Accounts Loyalty Program.

ADDITIONAL CHARITABLE DONATION

In addition to the loyalty payment as noted above, Insperity will make a charitable donation to a charitable organization for which the person making the referral is an employee, volunteer, or member of such charitable organization's board of directors ("Your Charitable Organization"). If you earned a \$500 loyalty payment for referring a Workforce Acceleration client, Insperity will make a \$250

donation to Your Charitable Organization. If you earned a \$1,000 or more loyalty payment for referring a Workforce Optimization client, Insperity will make a \$500 donation to Your Charitable Organization. If you earned a \$3,000 or more loyalty payment for referring a Workforce Optimization client, Insperity will make a \$1,500 donation to Your Charitable Organization. If you earned a \$4,000 or more loyalty payment for referring a Workforce Optimization client, Insperity will make a \$2,000 donation to Your Charitable Organization. If you earned a \$5,000 or more loyalty payment for referring a Workforce Optimization client, Insperity will make a \$2,500 donation to Your Charitable Organization.

To be eligible, Your Charitable Organization must be a non-profit and tax-exempt charitable organization as described in Section 501(c) (3) or 170(c) of the Internal Revenue Code and must furnish information requested by Insperity concerning evidence of its tax-exempt status before the charitable donation will be paid. Additionally, Insperity reserves the right in its sole discretion to refuse to make contributions to non-profits that it deems controversial or that it deems not in Insperity's best interest.

CHANGES TO THESE RULES AND RESTRICTIONS

Insperity reserves the right to change the eligibility requirements or any other term of this Insperity Middle Market National Accounts Loyalty Program at any time without notice. Insperity may discontinue the Insperity Middle Market National Accounts Loyalty Program at any time in its sole discretion. These rules and restrictions were last updated on April 14, 2022.