

Product Sponsor Reimbursement Guidelines

Best Practice: Contact your company wholesaler to confirm specific requirements and method of delivery.

- 1) Copy of compliance approved invitation
- 2) Attendance list
- 3) Invoice/receipts
- 4) Proof of payment (\$0 balance invoice, cancelled check, credit card statement showing payment)
- 5) Attached letter printed on your letterhead

(Date)

(Wholesaler Name)

(Title)

(Fax or email)

Dear (Wholesaler),

Thank you for your support in the amount of (\$\$\$\$) for dinner at our recent (type of event) held on (date) at (location) for (name of rep). The event was very well received with great feedback. Our clients/prospects found the event to be very enjoyable.

We really appreciate your support for these events and our clients had a wonderful time. Please send reimbursement to:

(Name of Broker Dealer)

(Address of Broker Dealer)

We look forward to working with you again. Please contact me if you need anything additional. I can be reached at (phone number) or by email at (email address). Thank you.

Sincerely,

(Rep Name)

(Title)