

2021 Circle of Excellence Application to Qualify



Qualification for Circle of Excellence is based on personal income. **Individuals seeking qualification must be current WIFS members, provide 2020 income documents and submit application information between April 1 & July 31, 2021. Late or incomplete applications will not be considered.**

Name (As you prefer it to appear): _____

Chapter Name (If applicable): _____ Phone: _____

Confirmation Receipt Email Address: _____

Partners for Excellence Affiliation:

- Prudential National Life Group Lincoln Financial Group Penn Mutual
 Principal SPS Family/Sigma Amerisure Amaritas None

Primary Industry Affiliation (Select 1):

- Agency Owner Home Office Producer/Advisor Other
 CPA Front Line Manager Attorney

Total Reported 2020 Gross Income: _____

Income Documentation Provided (Select All That Apply):

- 1040 1120 1099 Schedule C W2

Protect your privacy! Black out all sensitive data (SSN and addresses)

Award Shipping Information (PO Boxes excluded. Company information is required for business addresses only.)

Agency/Company: _____

Shipping Address: _____ Suite#: _____

City/State/Zip: _____

Qualification Preference (1 Option must be selected to qualify):

- PUBLISHED** My name and qualifying level WILL appear in WIFS communication. I will receive an award.
 UNPUBLISHED My name and qualifying level WILL NOT appear in WIFS communication. I will receive an award.
 ANONYMOUS My name will be completely unknown. I WILL NOT receive an award or any recognition.

I respectfully acknowledge that the qualification information provided is accurate.

Signature: _____

Return the completed application and income documentation **no later than July 31, 2021** to:

WIFS Circle of Excellence, 136 Everett Rd, Albany, NY 12205

Fax: (518) 935-9232 | Email: office@wifsnational.org

NOTE: Qualifiers are notified by email. If you do not receive an email, contact the National Office, (866) 264-9437