

# Business Solutions Group Resource Guide

Content listed in this document can also be found on [LSEngage](#) under "Resources" --> "Business Solutions Group"

## Decision Maker Content

### Proposals (Legal Only)

- [Legal Plan Proposal](#)
- [Legal Plan Mini Proposal](#)
- [Legal Proposal - NY](#)
- [Legal Proposal - NV](#)
- [Legal Proposal - Canada](#)

### Proposals (IDShield Only)

- [IDShield Mini Proposal - 1B](#)
- [IDShield Mini Proposal - 3B](#)
- [IDShield Mini Proposal - 1B&3B](#)
- [IDShield Full Proposal - 1B](#)
- [IDShield Full Proposal - 3B](#)
- [IDShield Full Proposal - 1B&3B](#)
- [Canada - IDShield Full Proposal](#) **NEW**

### Proposals (Legal & IDShield)

- [Legal + IDShield Mini Proposal - 1B](#)
- [Legal + IDShield Mini Proposal - 3B](#)
- [Legal + IDShield Mini Proposal - 1B&3B](#)
- [Legal + IDShield Full Proposal - 1B](#)
- [Legal + IDShield Full Proposal - 3B](#)
- [Legal + IDShield Full Proposal - 1B & 3B](#)
- [Nevada - Legal + IDShield Full Proposal - 1B](#)
- [Nevada - Legal + IDShield Full Proposal - 3B](#)
- [New York - Legal + IDShield Full Proposal - 1B](#)
- [New York - Legal + IDShield Full Proposal - 3B](#)
- [Canada - Legal + IDShield Proposal](#) **NEW**

### Automated Group Proposal Generator

- [Online Group Proposal Generator](#)
- [\\$18.95 Legal Plan Group Rate Request Form](#)

### HR Flyers

- [Portfolio of Services At-a-Glance](#) **UPDATED**
- [Legal + IDShield - HR Poster](#)
- [Legal + IDShield - HR Poster \(Spanish\)](#)
- [Legal + IDShield - Enrollment Invitation Flyer](#)
- [LegalShield - Breakroom Poster](#)
- [IDShield - Breakroom Poster](#)

### Proposals **UPDATED - REDUCED IDS RATES!**

- [REDUCED IDShield Full Proposal - 1B](#)
- [REDUCED IDShield Full Proposal - 3B](#)
- [REDUCED IDShield Full Proposal - 1B&3B](#)
- [REDUCED IDShield + Legal Full Proposal - 1B](#)
- [REDUCED IDShield + Legal Full Proposal - 3B](#)
- [REDUCED IDShield + Legal Full Proposal - 1B & 3B](#)

### Presentations **UPDATED - REDUCED IDS RATES!**

- [Employee Enrollment Presentation - Full](#)
- [Employee Enrollment Presentation - Mini](#)
- [Legal + IDS Decision Maker Presentation](#)
- [IDShield Decision Maker Presentation](#)
- [LegalShield Will Workshop Presentation](#)
- [Canada Decision Maker Presentation](#)

### Licensed Agent

- [Licensed Agent Program FAQs](#)
- [Licensed Agent Certification Training](#)
- [Licensed Agent Online Agreement Process](#)
- [Licensed Agent Online Agreement Video Tutorial](#)
- [Licensed Agent Agreement - Fillable PDF](#) **UPDATED**
- [Writing Agent Agreement - Fillable PDF](#)
- [Licensed Agent Regional Director Map](#)
- [Licensed Agent Clearance Form](#)
- [Licensed Agent Brochure](#)

## Group Enrollment Content

### Legal Only

- [Legal Plan Group Enrollment Flyer](#)
- [Spanish Legal Plan Group Enrollment Flyer \(Spanish\)](#)
- [Legal Plan Group Enrollment Flyer - NY](#)
- [Legal Plan Group Enrollment Flyer - NV](#)

### IDShield Only **UPDATED**

- [1B Group Enrollment Flyer](#)
- [3B Group Enrollment Flyer](#)

### Legal & IDShield **UPDATED**

- [Legal + IDShield - 1B Group Enrollment Flyer](#)
- [Legal + IDShield - 3B Group Enrollment Flyer](#)
- [Legal + IDShield - 1B Group Enrollment Flyer - NY](#)
- [Legal + IDShield - 3B Group Enrollment Flyer - NY](#)
- [Legal + IDShield - 1B Group Enrollment Flyer - NV](#)
- [Legal + IDShield - 3B Group Enrollment Flyer - NV](#)
- [Legal + IDShield Plan Summary \(1 Page\)](#)
- [Spanish Legal Plan + IDShield Plan Summary \(1 Page\) \(Spanish\)](#)

### Canada

- [LegalShield Enrollment Flyer - Canada](#)
- [IDShield Enrollment Flyer - Canada](#) **NEW**
- [IDShield Enrollment Flyer - Quebec only](#)
- [Legal + IDShield - Group Enrollment Flyer - Canada](#) **NEW**

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## Membership Collateral

### Legal Only

- [Legal Plan Flat Sheet](#)
- [Spanish Legal Plan Flat Sheet \(Spanish\)](#)
- [Legal Plan Flat Sheet - NY](#)
- [LegalShield - Account Creation Flyer](#)
- [LegalShield - Account Creation Flyer \(Spanish\)](#)
- [LegalShield - Top 5 Areas of Law](#)
- [LegalShield - Mobile App](#)
- [LegalShield - Benefit Booklet Insert](#)
- [LegalShield - Member Portability Flyer](#)
- [LegalShield - Word Search Flat Sheet](#)
- [101 Reasons to Use LegalShield](#)
- [101 Reasons to Use LegalShield \(Spanish\)](#)
- [25 Reasons to Be Legal Ready](#)
- [5 Reasons to Make a Will](#)
- [LegalShield - Expected and Unexpected Flyer](#)
- [LegalShield - Member Bill of Rights](#)

### IDShield Only

- [IDShield - Brochure](#)
- [IDShield - Flat Sheet](#)
- [IDShield - Account Creation Flyer](#)
- [IDShield - Account Creation Flyer \(Spanish\)](#)
- [IDShield - Privacy Check Flyer](#)
- [IDShield - Privacy Check & Rep Mgmt - Getting Started](#)
- [IDShield - Trend Micro Flyer](#)
- [IDShield - Benefit Booklet Insert](#)
- [IDShield - Member Portability Flyer](#)
- [IDShield - Mobile App Flyer](#)
- [IDShield - Word Search Flat Sheet](#)
- [50 Reasons to Use IDShield](#)

### Legal Plan + IDShield

- [Legal + IDShield Flat Sheet](#)
- [Spanish Legal Plan + IDShield Flat Sheet \(Spanish\)](#)
- [Legal + IDShield - Account Creation Flyer](#)
- [Legal + IDShield Account Creation Flyer \(Spanish\)](#)
- [Legal + IDShield - Benefit Booklet Insert](#)
- [Legal + IDShield - Member Pre-Cancel Flyer](#)
- [Credit Counseling & Education Flat Sheet](#)

### CDLP

- [CDLP - Competitive Comparison Chart](#)
- [CDLP - Basic Commercial Drivers Legal Plan](#)
- [CDLP - Super Commercial Drivers Legal Plan](#)
- [CDLP - Basic CDLP Brochure](#)
- [CDLP + Legal Plan - Interactive Flyer](#)
- [CDLP - Quick Start Guide](#)

### Canada

- [LegalShield Flat Sheet - Canada](#)
- [IDShield Flat Sheet - Canada](#)

### Legal Plan Add-ons

- [Legal Plan Add-Ons Flyer \*\*UPDATED\*\*](#)
- [Gun Owner Supplement Comparison Flat Sheet](#)
- [Gun Owner Supplement Flat Sheet](#)
- [Home Business Add-on Flyer \*\*NEW\*\*](#)
- [Home Business Add-on Overview \(for Associate Reference\)](#)
- [Business Plus Supplement Overview](#)
- [Business Plus Supplement Activation Steps](#)
- [Legal Plan Trial Defense Supplement](#)
- [Small Business Trial Defense Supplement Flat Sheet](#)
- [Rideshare & Delivery Supplement Flat Sheet](#)
- [Rideshare & Delivery Supplement Flat Sheet - New York](#)

### Employee Benefit Surveys **UPDATED**

- [Employee Legal Needs Study](#)
- [LegalShield Employee Benefits Communication Study](#)

### Education Guides

- [The Dark Web](#)
- [Estate Planning Guide](#)
- [Five Steps to Take in the Event of a Cyberattack](#)
- [Home Title Fraud](#)
- [Home Title Fraud Guide - IDShield](#)
- [Home Title Fraud - LegalShield & IDShield](#)
- [Protect Identity on Vacation](#)
- [Tips to Protect Identity During Holiday Season IDShield](#)
- [Protect Your Legal Rights - Covid Education Guide](#)
- [Protect Your Legal Rights & Identity - Covid Educational Guides](#)
- [Protect Your Identity & Privacy - Covid Educational Guide](#)
- [Tax Audit Flyer](#)
- [Student Loan Forgiveness Guide](#)
- [Inflation Consumer Finance](#)

### Public Servant Legal Plan

- [Public Servant Legal - Plan Flat Sheet](#)
- [Public Servant Legal Plan - Enrollment Flyer](#)
- [Public Servant Legal Plan - Enrollment Flyer - NY](#)
- [FAQs - Public Servant Legal Plan](#)

### Small Business Plans

- [Small Business Legal Plans - Marketing Sheet](#)
- [Small Business Small Group Membership Overview](#)
- [Small Business - Portfolio of Services](#)
- [Small Business - Proposal - Essentials, Plus and Pro](#)
- [Small Business - Proposal - Essentials Only](#)
- [Small Business - Proposal - Plus Only](#)
- [Small Business - Proposal - Pro Only](#)
- [Small Business Legal Plans - Flat Sheet - NY](#)

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## Pricing & Compensation

### Group Pricing Charts

- [Pricing Chart – US](#)
- [Pricing Chart – CA](#)
- [FAQs – Pricing](#)

### Commission & Compensation Plans **UPDATED**

- [FAQs - Associate Commission](#)
- [Comp Plan - Groups under 200 employees – BASIC](#)
- [Comp Plan - Groups under 200 employees - ELITE](#)
- [Comp Plan - Groups 200 or more employees](#)
- [\\$29.95 CDLP Group Compensation Plan](#)
- [\\$32.95 CDLP Network Compensation Plan](#)
- [\\$39.95 Super CDLP Group Compensation Plan](#)
- [\\$44.95 Super CDLP Network Compensation Plan](#)

## Gem Overview & Leaderboards

### Associate Gem Rankings

- [2025 - Gem Qualification Overview](#)
- [2024 - Gem Qualification Overview](#)

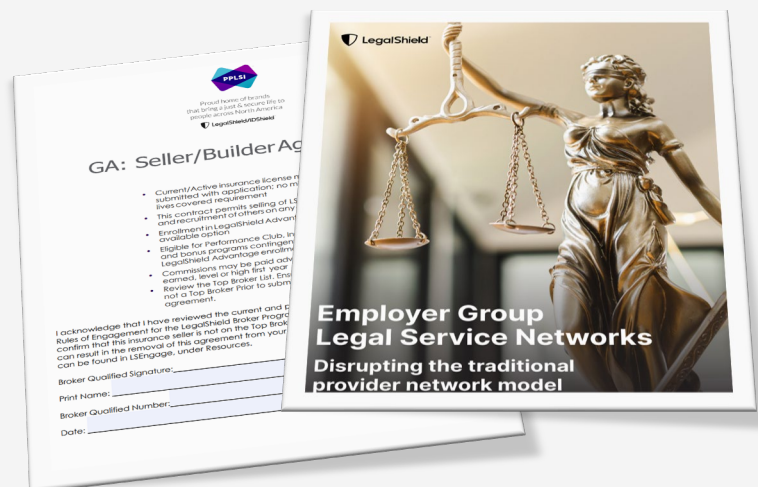
### Associate Gem Leaderboards

- [2024 - Emerald Elite Leaderboard](#)
- [2024 - Sapphire Elite Leaderboard](#)
- [2024 - Ruby Leaderboard](#)

## Solutions Services General Content & FAQs

### General Content

- [Group Authorization Form – US \*\*UPDATED\*\*](#)
- [Group Authorization Form – Canada \*\*UPDATED\*\*](#)
- [Group Upgrade Request Form](#)
- [Group Website Flat Sheet](#)
- [Group Availability Process](#)
- [ShieldatWork/Group Website Feedback Form](#)
- [Online Group Proposal Generator](#)
- [Business Solutions Recruiting Orientation Website](#)
- [Online Form for Competitive Feedback](#)
- [Request for Approval - Employer Paid Group with 100+ Employees](#)
- [Agreement – Licensed Agent Seller/Builder \*\*UPDATED\*\*](#)
- [Agreement - Writing Agent](#)
- [Business Solutions Field Trainer List](#)
- [Business Solutions Field Trainer List \(Deaf Friendly\)](#)
- [Commission Share Agreement](#)
- [ShieldAtWork HR Admin Quick Start Guide](#)
- [Pandemic Whitepaper Fact Sheet](#)
- [Whitepaper: Employer Groups Provider Service Networks](#)
- [Whitepaper: Navigating the New Socioeconomic Landscape](#)
- [FAQs – Home Business Add-on \*\*NEW\*\*](#)
- [FAQs – LegalShield en Espanol \*\*NEW\*\*](#)
- [FAQs – Group Utilization Reports](#)
- [FAQs - National Plan Premium Attribution](#)
- [FAQs - Conservation Group Reassignment](#)
- [FAQs - Group Enrollment Websites](#)
- [FAQs - Group Upgrades](#)
- [FAQs – ShieldAtWork](#)
- [FAQs – Sunsetting Launch by LegalShield](#)
- [FAQs – Public Servant Legal Plan](#)
- [Group Reassignment Policy](#)
- [Group Servicing Guidelines](#)
- [National Broker List \(formerly referred to as Top Broker\)](#)



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## Open Enrollment Toolkit\*

### Pre-Open Enrollment

- [Pre OE - LegalShield](#)
- [Pre OE - IDShield](#)
- [Pre OE - Legal + IDShield](#)

### Communication Memos

- [OE - LegalShield Open Enrollment Email Memo](#)
- [OE - IDShield Open Enrollment Email Memo](#)
- [OE - Legal + IDShield Open Enrollment Email Memo](#)
- [OE - LegalShield Open Enrollment Email Memo - Legacy](#)
- [OE - IDShield Open Enrollment Email Memo - Legacy](#)

### New Hire Memos

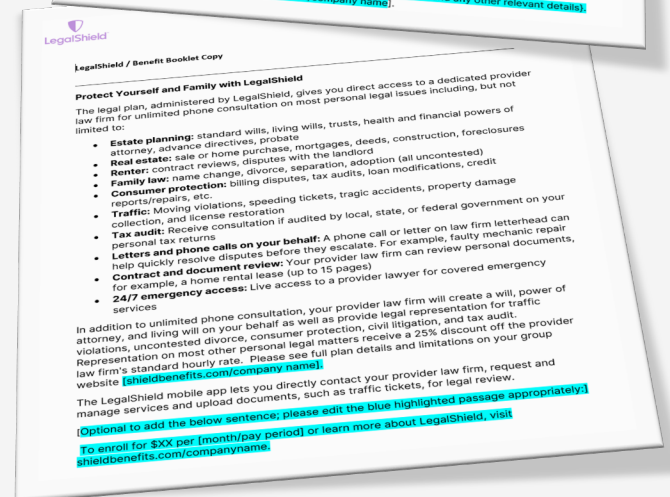
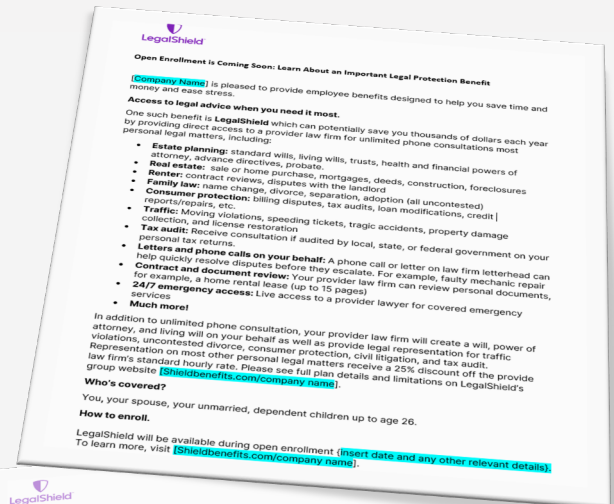
- [OE - New Hires - LegalShield](#)
- [OE - New Hires - IDShield](#)
- [OE - New Hires - LegalShield + IDShield](#)

### Qualifying Status Change Memos

- [OE - Qualifying Status Change - LegalShield](#)
- [OE - Qualifying Status Change - IDShield](#)
- [OE - Qualifying Status Change - LegalShield + IDShield](#)

### Benefit Booklet Communication Memos

- [Benefit Booklet Copy - LegalShield](#)
- [Benefit Booklet Copy - IDShield](#)
- [Benefit Booklet Copy - LegalShield + IDShield](#)
- [Benefit Booklet Copy - Legal + IDShield + GOS Supplement](#)



\*Please carefully review documents (including disclaimers) before sending to a client to ensure they only reference features that apply to that client. (e.g., Reputation Management coverage does not apply to IDShield plans prior to 2020 and Trend Micro features are only included in the newest IDShield plan.)

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## Video Content

### Legal

- [LegalShield - Product Overview](#) (Spanish subtitles available)
- [LegalShield Product Overview](#) (by Brian Parker) **NEW**
- [LegalShield - Employee Benefit Overview](#)
- [LegalShield - Mobile App Sizzle Video](#)
- [LegalShield - New Member Onboarding](#)
- [LegalShield Will Preparation Video- Employee Version](#)
- [LegalShield Will Preparation Video- HR Version](#)
- [Provider Network Video](#)
- [Gun Owners Supplement](#)
- [Gun Owners Supplement](#) (for Associate reference)
- [Educational video on the Basics of Estate Planning](#)
- [Home Related Legal Matters](#)

### IDShield

- [IDShield Product Video](#)
- [IDShield Product Video \(Legacy\)](#)
- [IDShield Privacy Check Video](#)
- [IDShield Reputation Management Walk Through](#)
- [IDShield - New Member Onboarding](#)
- [IDShield - Employee Benefits](#)
- [IDShield - Mobile App Demo](#)
- [IDShield - Licensed Private Investigators Video](#)

### Legal & IDShield

- [Legal + IDShield - Product Overview - Employees](#)
- [Legal + IDShield - Product Overview - Broker/Employer](#)
- [Legal + IDShield - Product Overview \(Legacy\)](#)
- [Legal + IDShield - Mobile App](#)

### Sample Enrollment Presentations **NEW**

- [Sample Enrollment Presentation #1](#) (Martavius Hillman)
- [Sample Enrollment Presentation #2](#) (Mindy Rogers)

### Small Business

- [Small Business Legal Plans and Home Biz Overview](#)
- [LegalShield Small Business Plan - Lawyer on Retainer](#)

### CDLP

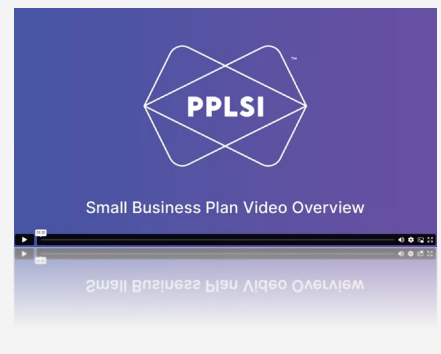
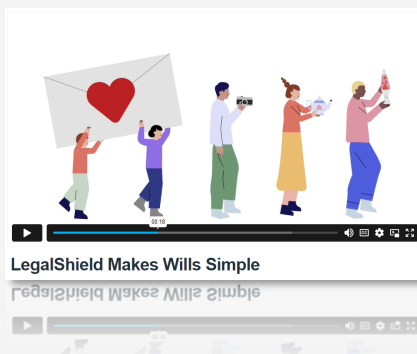
- [Commercial Driver Legal Plan Video](#)

### Recruiting

- [Licensed Agent Recruiting Video \(2 min\)](#)
- [Licensed Agent Recruiting Video \(5 min\)](#)
- [Licensed Agent Recruiting Video \(Rachael Lawton\)](#)
- [Ted Vitalo Recruiting Video](#)
- [Opportunity Overview - Mike Riches](#)
- [Full B2B Opportunity - Bill Stovall & Mike Riches](#)

### Trend Micro

- [Trend Micro - Security 2021 - Overview](#)
- [Trend Micro - How to Install Trend Micro Security](#)
- [Trend Micro - How to Use Parental Controls](#)
- [Trend Micro - How to Use Privacy Scanner](#)
- [Trend Micro - How to Set Up the Toolbar](#)
- [Trend Micro - How Mute Mode Works](#)
- [Trend Micro - How to Set Up the Toolbar on Pay Guard](#)
- [Trend Micro - How to Use the Toolbar's Page Ratings](#)
- [Trend Micro - How to Use the Fraud Buster](#)



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## Legacy Enrollment Resources\*

### IDSShield Only Enrollment

- [Legacy - IDSShield Credit Plan Interactive Flyer](#)
- [Legacy - IDSShield Full Plan Interactive Enrollment Flyer](#)
- [Legacy - 2019 IDSShield Group Enrollment Flyer](#)
- [Legacy - 2020 IDSShield 1B Group Enrollment Flyer](#)
- [Legacy - 2020 IDSShield 3B Group Enrollment Flyer](#)

### Legal + IDSShield

- [Legacy - \\$15.95 Standard Legal Plan](#)
- [Legacy - \\$15.95 Standard Legal Plan USA with IDSShield Credit Plan](#)
- [Legacy - \\$15.95 Standard Legal Plan USA with IDSShield Full Plan](#)
- [Legacy - \\$15.95 Standard Legal Plan USA with 2019 IDSShield Plan](#)
- [Legacy - Legal Plan with IDSShield Credit Plan](#)
- [Legacy - Legal Plan with IDSShield Full Plan](#)
- [Legacy - Legal Plan with 2019 IDSShield Group Interactive Flyer](#)
- [Legacy - Legal Plan with 2020 IDSShield 1B Group Interactive Flyer](#)
- [Legacy - Legal Plan with 2020 IDSShield 3B Group Interactive Flyer](#)

### New York

- [Legacy - \\$15.95 New York Legal Plan Standalone](#)
- [Legacy - \\$20.95 New York Legal Plan Standalone](#)
- [Legacy - New York Legal Plan with IDSShield Credit Plan](#)
- [Legacy - New York Legal Plan with IDSShield Full Plan](#)
- [Legacy - New York Legal Plan with 2019 IDSShield Group Interactive Flyer](#)
- [Legacy - New York Legal Plan with 2020 IDSShield Group Interactive Flyer](#)

### Nevada

- [Legacy - \\$15.95 Nevada Legal Plan with 2019 IDS Enrollment Flyer](#)
- [Legacy - \\$15.95 Nevada Legal Plan with 2020 IDS Enrollment Flyer](#)
- [Legacy - Nevada Legal Plan with 2020 IDSShield 1B Group Interactive Flyer](#)
- [Legacy - Nevada Legal Plan with 2020 IDSShield 3B Group Interactive Flyer](#)

\*Please carefully review legacy enrollment flyers before sending to a client to ensure they only reference features that apply to that client. (e.g., Reputation Management coverage does not apply to IDSShield plans prior to 2020).