



2023 BIG "I" **COMPANY PARTNER** INVESTMENT OPPORTUNITIES

i

Empowering Trusted Choice®
Independent Insurance Agents.





OUR MISSION.

The Independent Insurance Agents & Brokers of America, Inc., known as the Big "I," is a national association which strives to provide independent insurance agents and brokers with a sustainable competitive advantage in the insurance marketplace by equipping members with tools and resources to maintain excellence in business and customer service.

WHO WE ARE.

The Big "I" is a federation comprised of 51 independent state associations, each led by an executive, staff and a volunteer agent leadership team. Many states also have local chapters. Over 26,000 agency locations have joined their state's association, which makes them national Big "I" members and Trusted Choice® agencies. The Big "I" has been proudly serving the independent agency community for more than 125 years.

Independent agents represent multiple insurance carriers, and offer choice, customization, and advocacy to their customers. Big "I" members primarily offer property-casualty coverage, but some also sell life-health, retirement, and employee benefit products.

OUR STRUCTURE.

The Big "I" is governed by a national board which is made up of an elected seven-person executive committee and has one volunteer agent chair and one volunteer agent director from each state association. Top priorities of the Big "I" include effective advocacy for its members in all branches of government and sectors of insurance, as well as effective communications both within and outside the industry on behalf of independent agents and brokers.

HOW WE HELP.

The Big "I" provides resources to help members build and grow their business. Member agencies have access to exclusive products, services and education created for independent agents, by independent agents and our partners.

BRANDING AND MARKETING.

- National consumer brand, Trusted Choice®
- Marketing, branding and content resources
- Education and training
- Website and social media reviews

TALENT PIPELINE.

- Leadership and sales skills for young agents
- Access to candidates and job posting tools
- Agency perpetuation and ownership resources

RESEARCH AND ADVOCACY.

- State and federal legislative advocacy
- In-depth research on the independent agency system
- Best Practices analysis and resources for agencies of any size
- Technical insurance expertise
- Technology resources and roadmaps

LEARN MORE AT: independentagent.com

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Big I Independent Agents

**EDUCATE
CONSUMERS
ON THE
VALUE OF
A TRUSTED
CHOICE®
INDEPENDENT
AGENT**



Unites independent agents and brokers under one brand.

trustedchoice.independentagent.com

- Educates consumers on the value of independent insurance agents and brokers through national advertising campaigns via digital, OTT, TV, and social media
- Highlights the choice, customization and advocacy only independent agents can offer
- Assists members with their marketing efforts by providing free content and resources that help agents stand out while leveraging the Trusted Choice brand
- Creates cohesive grassroots marketing and community service campaigns

Only one brand has united more than 26,000 independent agency locations for the past 20 years: Trusted Choice. The brand gives the independent agency channel the leverage it needs to compete in the insurance marketplace.

Trusted Choice helps independent agents with marketing resources such as website analysis, custom marketing materials, social media content, and training programs.

When agents want to boost their brand equity, they lean on Trusted Choice to do the heavy lifting so they can focus on what's important to their customers.

Trusted Choice's expanded national advertising campaigns reached more than 100 million consumers on major networks and digital streaming services. Additionally, the brand is boosting the visibility of agents on a national and local level with original consumer content reaching more than 75,000 social media followers and countless websites and streaming services.

By supporting Trusted Choice, the national brand for independent insurance agents, you help secure a strong and lucrative future for the independent agency system.

ANNUAL PARTNERSHIP INVESTMENT

For every \$100 of property-casualty premium written through independent agents

First year: 50¢
Second year (& beyond): 1¢
Minimum: \$5,000
Maximum: \$450,000



Position your company on the #1 independent insurance directory.

iacompanies.trustedchoice.com

- TrustedChoice.com appears in more than 130 million Google searches each year
- Generates over 6.6 million agency recommendations per year to inbound insurance shoppers
- Get boosted ranking and SEO advantages while getting recommended for the business you want to write

Through constant research, SEO refinement, and insurance buyer data gathering, TrustedChoice.com's determination to deliver digital handshakes has attracted over 37 million insurance shopper opportunities for the independent insurance agent channel since 2013. As an Advantage company partner you can strengthen your brand, reach more agents and consumers, and drive more opportunities.

Make sure agents and consumers understand your brand and products. A custom profile on TrustedChoice.com showcases your brand featuring:

- Boosted ranking and SEO advantages
- Custom company description and territories
- Appetite specialization detail
- Products offered and locations serviced
- Agent resource center
- Testimonials
- Promotional video

Get recommended for the business you want to write. With a Level Two plan you get these opportunity-generating features:

- Company recommendations: get your brand and products recommended for the business you most want to write
- Agent recommendations: Drive more business to your best agents on multiple IA websites
- Share your appetite with agents
- SEO content targeted to your company appetite
- Receive immediate and monthly traffic and opportunity data

GIVE YOUR INSURANCE COMPANY
AN ADVANTAGE

To learn about partnering with TrustedChoice.com, contact Vinnie Savarese at:

Vincent.Savarese@TrustedChoice.com

SHAPE
THE FUTURE
THROUGH
RESEARCH
AND
ANALYSIS

BEST
PRACTICES.



- Cultivates data from the industry's top performing agencies
- Sets industry performance benchmarks to help agents continuously improve and innovate
- Develops resources and education to empower agents with growth strategies

ANNUAL PARTNERSHIP INVESTMENT

Annual investment opportunities vary by individual company involvement.

Create a more profitable distribution force by leveraging the analysis of the best agencies in the nation.

independentagent.com/bestpractices

The Big "I" Council for Best Practices helps independent agents and brokers boost productivity, increase sales and improve agency operations. Sponsors of the program are leading the charge to improve, grow, perpetuate and increase the value of the independent agency system. By supporting the Council for Best Practices, companies have access to the latest data about leading agencies and influence the future direction of the program. With a finger on the pulse of this elite group, companies can use the data to provide a framework for marketing efforts and help agents be more successful. In August 2022, new Best Practices Agencies were announced and a new comprehensive study released providing an opportunity to recognize and learn from the industry's best. In January 2023, the Best Practices Symposium will take place in Savannah, Georgia to honor the new Best Practices Agencies in a two-day education and networking event with invitations sent exclusively to study sponsors from Reagan Consulting.

FUTURE
ONE.



- Shapes insurance laws and improves insurance regulation
- Helps develop policy consensus on national and state issues
- Conducts the most authoritative, in-depth research available on the independent agency system
- Provides data analysis for company partners

ANNUAL PARTNERSHIP INVESTMENT

Annual participation based on written premium

Less than \$250 million:	\$3,000
\$250-\$600 million:	\$6,000
\$600-\$750 million:	\$12,000

Lead industry research and government affairs.

independentagent.com/agencyuniverse

Future One brings the industry's top stakeholders together for two critical purposes: (1) industry research and (2) state and federal government affairs. The Agency Universe Study, which examines industry trends every two years, is the foremost authority on agency operations, technology use, staffing and perpetuation trends.

Effective legislation and regulation come from teamwork—a philosophy that is the basis of Future One's government affairs efforts. By supporting Future One, companies help secure legislation and regulations that are favorable for the industry.

\$750-\$1 billion:	\$18,000
More than \$1 billion:	\$26,000



AGENTS COUNCIL
FOR TECHNOLOGY.



Provide education, tools and guidance on ways technology can support the strategic plans of the independent agency distribution channel.

independentagent.com/act

- Hosts and facilitates a forum for insurance companies, agencies, technology providers, associations and user groups to help agencies leverage technology to achieve their competitive business strategies.
- Engages the insights and guidance of industry innovators to create best practices for technology implementations to improve an agency's efficiency, productivity, security, customer experience, disaster planning and more.
- Working in collaboration with supporting members, industry partners and Big "I" member agents, ACT engages various virtual work groups and hosts in-person and virtual meetings.

The Agents Council for Technology (ACT) leads the conversation regarding implementing innovative technologies that result in more efficiencies for the independent agency system. This forum of agents, brokers, vendors, carriers and other industry groups conducts research and provides best practices recommendations to help the industry implement more consistent, effective technology. ACT's virtual work groups create industry-wide education and recommendations on future issues and emerging trends such as cybersecurity, the customer experience, data & analytics, disaster planning, and other tech-related focus areas.

ANNUAL PARTNERSHIP INVESTMENT

Based on employee count

> 700:	\$11,500
350-700:	\$5,750
< 350:	\$2,875



**ATTRACT
AND
DEVELOP
THE BEST
TALENT
FOR YOUR
DISTRIBUTION
FORCE**

DIVERSITY
COUNCIL.



Enhance agency value through diversity.

independentagent.com/diversity

- Contributes to the growth of Big "I" agencies by ensuring agency ownership, staffing, and clientele continues to evolve in both diversity and inclusivity.
- Serves as thought leader across the independent agency channel (and beyond) on diversity and inclusion principles and best practices
- Offers online resources including educational materials, marketing plans, webinars and best practices on a wide variety of DEI topics.

ANNUAL PARTNERSHIP INVESTMENT

Carrier Partner:	\$10,000
Carrier Subsidiary Brand:	\$2,500
Brokerage:	\$5,000

Get involved with the Big "I" Diversity Council and help the independent agency channel achieve optimal market share growth on a state and national level.

Agents, brokers and carriers look to the Big "I" Diversity Council for research, education and resources to help the independent agency system better understand emerging and diverse markets. In an effort to build a stronger marketplace, the council, made up of agents and company executives, is dedicated to supporting multicultural agency appointments. The council has been recognized as one of the top 25 Diversity Councils in the U.S. by the Association of ERGs and Councils.

The council continues to create resources to help independent agencies implement strategies to enhance growth, innovation and sustainability through diversity and inclusion.

INVEST
PROGRAM.



Attract top talent to the independent agency channel.

investprogram.org

- Educates students on insurance and careers in the industry
- Connects insurance professionals with students and educators in their communities
- Offers scholarships to Invest graduates who want to pursue a career in insurance
- Provides insurance education resources at no cost to teachers and volunteers on its responsive website

For over 50 years, Invest has educated students on insurance and careers in the industry. Thanks to the support of carriers, vendors and the distribution force, Invest has introduced more than 32,000 students to the insurance business, creating thousands of potential recruits and insurance shoppers. Invest works with insurance agencies to encourage graduates to explore opportunities in our industry. By supporting Invest, a 501(c)(3) educational foundation, your organization will benefit from being part of a mission that's setting the stage for the future of the insurance industry.

ANNUAL PARTNERSHIP INVESTMENT

Valedictorian:	\$15,000+
Salutatorian:	\$7,500-\$14,999
Honor Roll:	\$2,500-\$7,499



YOUNG
AGENTS.



2023 Big "I" Legislative Conference
April 26-28 | Renaissance Washington,
DC Downtown Hotel Washington, D.C.

- Provides sales, leadership, volunteer and networking opportunities
- Encourages young people to protect the industry by involving them in the legislative process
- Cultivates the next generation of independent agency system leaders

ANNUAL PARTNERSHIP INVESTMENT

Platinum:	\$12,500
Gold:	\$7,500
Silver:	\$5,000
Bronze:	\$2,500

Engage a network of future insurance industry leaders.
independentagent.com/youngagents

2023 Big "I" Young Agents Leadership Institute
Sept. 8-9 | Amway Grand Plaza Hotel
Grand Rapids, MI

If connecting with the industry's future decision makers is a priority, partnering with the Big "I" national Young Agents is a priceless opportunity for your organization.

The Big "I" national Young Agents Committee (YAC) provides young insurance professionals with educational and leadership opportunities to help them cultivate successful and rewarding insurance careers. Companies have an opportunity to build relationships with the future leaders of the independent agency system when they attend the Big "I" Young Agents Leadership Institute and the Big "I" Legislative Conference.





ENGAGE DECISION MAKERS

BIG "I" LEGISLATIVE CONFERENCE

Network with industry leaders poised to protect the insurance marketplace

independentagent.com/events

- Creates a unified voice for the independent agency system on Capitol Hill
- Provides networking opportunities with the most influential agents and brokers in the nation

Investment levels for the Big "I" Legislative Conference range from \$5,000-\$50,000

The annual Big "I" Legislative Conference is the premier insurance industry event for agents, brokers and company executives held in Washington, D.C. Agents visit approximately 400 congressional offices during the pilgrimage to the nation's capital.

Attendees benefit from a power-packed program, including a legislative issues briefing and presentations from prominent political speakers, time to lobby on Capitol Hill, a general session on top industry topics and numerous networking opportunities. Legislators and association leaders are recognized throughout the event for their outstanding service to the industry and the Big "I."

Companies that sponsor this event benefit from extensive exposure to the industry's most influential independent agents and brokers.

2023 BIG "I" LEGISLATIVE CONFERENCE | APRIL 26-28, 2023

Renaissance Washington, DC Downtown Hotel
Washington, D.C.

2024 BIG "I" LEGISLATIVE CONFERENCE | APRIL 10-12, 2024

Renaissance Washington, DC Downtown Hotel
Washington, D.C.

Connect with your **DISTRIBUTION FORCE.**

Contact Beth Montgomery, vice president, company relations at beth.montgomery@iiaba.net

Support **INDEPENDENT AGENTS.**

2023 BIG "I" COMPANY PARTNER ANNUAL INVESTMENT OPPORTUNITIES

TRUSTED CHOICE®.

For every \$100 of property-casualty premium written through independent agents

First year: 50¢
Second year (& beyond): 1¢
Minimum: \$5,000
Maximum: \$450,000

YOUNG AGENTS.

Platinum: \$12,500
Gold: \$7,500
Silver: \$5,000
Bronze: \$2,500

COUNCIL FOR BEST PRACTICES.

Annual investment opportunities vary by individual company involvement.

DIVERSITY COUNCIL.

Carrier Partner: \$10,000
Carrier Subsidiary Brand: \$2,500
Brokerage: \$5,000

AGENTS COUNCIL FOR TECHNOLOGY.

Based on employee count

> 700: \$11,500
350-700: \$5,750
< 350: \$2,875

INVEST.

Valedictorian: \$15,000+
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Annual participation based on written premium

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BIG "I" LEGISLATIVE CONFERENCE.

Platinum: \$50,000+
Gold: \$20,000-\$49,999
Silver: \$10,000-\$19,999
Bronze: \$5,000-\$9,999

SECURE YOUR INVESTMENT TODAY.

Beth Montgomery
Vice President, Company Relations

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independentagent.com/companypartners



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