



2022 BIG "I"  
**COMPANY PARTNER**  
INVESTMENT OPPORTUNITIES



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 25,000 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

## TALENT PIPELINE.

- Leadership and sales skills for young agents
- New insurance apprenticeship program
- 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](https://independentagent.com)



**EDUCATE**  
**CONSUMERS**  
ON THE  
VALUE OF  
A TRUSTED  
CHOICE<sup>®</sup>  
INDEPENDENT  
AGENT



Unites independent agents and brokers under one brand.

[trustedchoice.independentagent.com](https://trustedchoice.independentagent.com)

- Educates consumers on the value of independent insurance agents and brokers
- Highlights the choice, customization and advocacy only independent agents can offer
- Creates cohesive grassroots marketing and community service campaigns
- Assists members with marketing and training opportunities to differentiate their agencies while aligning with the national brand

Only one brand unites more than 25,000 independent agency locations: 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 digital reviews, customizable content including print, digital, social media and video as well as website development resources.

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.

In addition to national advertising campaigns running on major networks and digital streaming services Trusted Choice's new website features a recently launched bilingual marketing campaign, "The Big Picture." The campaign conveys to customers that independent agents offer trusted advice for a wide range of needs for both commercial and personal lines customers. Agents can order these ads for digital, print, social, and video marketing pieces.

Through a national partnership with Make-A-Wish®, Trusted Choice has contributed \$5M to the charity as a result of grants and social media engagement. Trusted Choice is boosting the visibility of agents on a national and local level with its more than approximately 75,000 social media followers and original consumer content.

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

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**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



Position your company on the #1 independent insurance directory.

[iacompanies.trustedchoice.com](http://iacompanies.trustedchoice.com)

- TrustedChoice.com appears in more than 20 million Google searches each month
- Generates over 1 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

Over 500,000 consumers visit TrustedChoice.com each month to connect with an independent agent. As an Advantage company partner you can strengthen your brand, reach more agents and consumers, and drive more opportunities. We were named the Webaward 2020 "Best Insurance Website" winner!

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](mailto:Vincent.Savarese@TrustedChoice.com)

**SHAPE**

THE FUTURE

THROUGH

RESEARCH

AND

ANALYSIS

**BEST PRACTICES.**



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

[independentagent.com/bestpractices](http://independentagent.com/bestpractices)

- 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.

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. Toward the end of 2021 a new agency nomination cycle will begin with a once every three opportunity to nominate agents to be a part of the research process and become a Best Practices Agency opening the door to many benefits.

**FUTURE ONE.**



Lead industry research and government affairs.

[independentagent.com/agencyuniverse](http://independentagent.com/agencyuniverse)

- 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

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.

Less than \$250 million:	\$3,000	\$750-\$1 billion:	\$18,000
\$250-\$600 million:	\$6,000	More than \$1 billion:	\$26,000
\$600-\$750 million:	\$12,000		



AGENTS COUNCIL  
FOR TECHNOLOGY.



Influence the industry's use of technology to improve workflows.

[independentagent.com/act](https://independentagent.com/act)

- Engages industry innovators to create best practices for more consistent technology implementations
- Offers a forum for insurance companies, agencies, technology providers, associations and user groups to accurately forecast technology trends
- Creates best practices to improve technology workflow, security, customer experience and online marketing
- Hosts in-person and virtual meetings and engages numerous virtual work groups

The Agents Council for Technology (ACT) leads the independent agency system in implementing innovative technologies that result in more efficient workflows. 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 & emerging trends, cybersecurity, the customer experience, data & analytics, disaster planning, and other tech-related focus areas.

Companies and vendors that want a more efficient and consumer-centric workflow will be on the leading edge by supporting ACT.

#### 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](http://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.

Recently, the council hosted the first-ever Level Up Agent Summit providing attendees with strategies to enhance growth, innovation and sustainability through diversity and inclusion.

INVEST  
PROGRAM.



Attract top talent to the independent agency channel.

[investprogram.org](http://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

ANNUAL PARTNERSHIP INVESTMENT

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

In 2020, Invest celebrated 50 years of educating 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 is currently working with several insurance agency networks to develop an apprentice program to encourage our 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.



**YOUNG AGENTS**



Engage a network of future insurance industry leaders.

[independentagent.com/youngagents](https://independentagent.com/youngagents)

2022 Big "I" Legislative Conference  
April 27-29 | Renaissance Washington,  
DC Downtown Hotel Washington, D.C.

2022 Big "I" Young Agents Leadership Institute  
Sept. 16-17 | Seneca Niagara Resort & Casino and The Conference &  
Event Center Niagara, Niagara Falls, NY

- 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

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.

#### ANNUAL PARTNERSHIP INVESTMENT

Platinum Plus:	\$12,500
Platinum:	\$10,000
Gold:	\$7,500
Silver:	\$5,000
General:	\$2,500





## ENGAGE DECISION MAKERS

### BIG "I" LEGISLATIVE CONFERENCE.

Network with industry leaders poised to protect the insurance marketplace

[independentagent.com/events](https://independentagent.com/events)

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

- 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

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, a day 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.

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2022 BIG "I" LEGISLATIVE CONFERENCE | APRIL 27-29, 2022

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

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

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](mailto:beth.montgomery@iiaba.net)

Support **INDEPENDENT AGENTS.**

## 2022 BIG "I" COMPANY PARTNER ANNUAL INVESTMENT OPPORTUNITIES

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### 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 Plus: \$12,500  
Platinum: \$10,000  
Gold: \$7,500

Silver: \$5,000  
General: \$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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### FUTURE ONE.

Annual participation based on written premium

Less than \$250 million: \$3,000  
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\$600 - \$750 million: \$12,000  
\$750 - \$1 billion: \$18,000  
More than \$1 billion: \$26,000

### 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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