



2020 BIG "I"  
**COMPANY PARTNER**  
INVESTMENT OPPORTUNITIES



# Independent Insurance Agents & Brokers Of America

The Independent Insurance Agents and Brokers (Big "I") represents more than 25,000 agency locations across the nation. The association's broad network on the ground helps us understand what's important to independent agents in their hometown. For more than a century, the Big "I" has been the leader in providing members the tools, knowledge and brand identity needed to effectively serve clients and build a successful agency.

## Shape the future through research and analysis

- ◆ **Research:** The biennial **Agency Universe Study** is the most comprehensive look at the independent agency system, examining factors such as agency operations, mix of business and expenses. The annual **Best Practices Study** takes an in-depth look at the top-performing agencies around the country in a variety of revenue categories.

**Collaboration:** The Agents Council for Technology, comprised of agents, brokers, vendors and carriers, provides best practices recommendations to help the industry implement more efficient technology workflows.

## Educate consumers

- ◆ **Brand Identity:** **Trusted Choice**® is the national marketing brand created exclusively for Big "I" members to help consumers understand the value an independent agent offers: choice, customization and advocacy.
- ◆ **Online Referrals:** **TrustedChoice.com** offers a platform for independent agents to help compete for the attention of online consumers.



## Advocate for the independent agency system

- ◆ **A Voice on Capitol Hill:** The well-respected **Big "I" Government Affairs** team is a powerful voice on insurance agent and broker issues in Washington. That presence, combined with agent participation in the annual **Big "I" Legislative Conference and InsurPac**, ensures that agents have a seat at the table for relevant legislative discussions.

## Attract the best talent to the industry

- ◆ **Workforce Recruitment:** **InVEST** educates students on insurance and potential career paths in the industry. The program connects insurance professionals with potential recruits in their communities.
- ◆ **Talent Development:** The **Young Agents** program provides sales, leadership, volunteer and networking opportunities to future independent insurance leaders.
- ◆ **Market Expansion:** The **Diversity Council** educates agents on how to engage and retain emerging markets in their community.

**OUR MISSION:**  
provide members with a sustainable  
competitive advantage.

# 2020 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: \$10,000+  
Gold: \$5,000 - \$9,999

Silver: \$2,500 - \$4,999  
General: \$1,000 - \$2,499

## COUNCIL FOR BEST PRACTICES.

Annual investment opportunities vary by individual company involvement.

## DIVERSITY COUNCIL.

Carrier \$10,000  
Brokerage \$5,000  
2020 Level Up Agent Summit Sponsor Inquire

## AGENTS COUNCIL FOR TECHNOLOGY.

Based on employee count

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

## INVEST.

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

## FUTURE ONE.

Annual participation based on written premium

Less than \$250 million: \$3,000  
\$250 - \$600 million: \$6,000  
\$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: \$3,000 - \$9,999

# SECURE YOUR INVESTMENT TODAY.

Beth Montgomery  
Vice President, Company Relations

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

# Educate Consumers on the value of a Trusted Choice® independent agent.



Unites independent agents and brokers under one brand

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

- **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.

Through a national partnership with Make-A-Wish®, Trusted Choice® has contributed over \$4,200,000 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 80,000 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.



Connecting the right consumer to the right independent agent, at the right time.

[solutions.trustedchoice.com/carriers](https://solutions.trustedchoice.com/carriers)

- **Attracts 500,000+ personal and commercial lines consumers monthly**, 75% of which is organic search supported by our SEO practices.
- **Generates over one million agency recommendations per year** to inbound insurance shoppers, matching shopper location and insurance needs to agency locale and appetite specializations.
- **Keeps your company's products and services** top of mind with agents and consumers.

TrustedChoice.com is the nation's largest internet marketing platform for independent agents with more than 25,000 participating agencies nationwide. TrustedChoice.com cultivates more than 6 million SEO driven inbound organic shoppers annually. State and company branded consumer portals leverage the same SEO strategies to drive even more shoppers to your distribution force.

TrustedChoice.com provides independent insurance agency and carrier participants the opportunity to compete against direct and captive companies for the attention of online insurance buyers at a national, regional and local level. Participation on TrustedChoice.com provides targeted visibility for the agents and insurance companies based on their business appetite. The TrustedChoice.com program is on pace to attract 7 million visitors and generate 200,000 opportunities for independent insurance agents in 2019.

TrustedChoice.com is a trusted resource for consumers, helping them make an informed insurance buying decision while also conveying the value of the independent agent—choice, expertise and advocacy. It's unique national internet marketing reach supports and empowers independent agents and carriers in the digital insurance marketplace.

## AGENTS COUNCIL FOR TECHNOLOGY.

Influence the industry's use of technology and 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 two in-person ACT meetings** a year and engages numerous virtual workgroups

The Agents Council for Technology (ACT) leads the independent agency system in implementing innovative technologies and 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 members create industry-wide education and recommendations on emerging trends, cybersecurity, the customer experience, real-time rating and download, disaster planning, the changing nature of risk, 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.

## BEST PRACTICES.

Create a more profitable distribution force by leveraging the analysis of the best agencies in the nation  
[independentagent.com/bestpractices](https://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

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.

## FUTURE ONE.

Lead industry research and government affairs  
[independentagent.com/agencyuniverse](https://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

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.

## DIVERSITY COUNCIL.

Enhance agency value through diversity  
[independentagent.com/diversity](https://independentagent.com/diversity)

- **Educates agents** on how to engage and retain emerging markets within their community
- **Increases market share** and diverse agency ownership within the independent agency channel
- **Offers online resources**, marketing plans and webinars on diversity and inclusion best practices

**2020 Big "I" Level Up Agent Summit**  
Jan. 14-15, New Orleans, Louisiana

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.

This year, the council will host the first-ever Level Up Agent Summit providing agents with key business strategies to enhance agency growth, innovation and sustainability through diversity and inclusion.

## InVEST PROGRAM.

Attract top talent to the independent agency channel  
[investprogram.org](https://investprogram.org)

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

Learn insurance and love your career. That's the message InVEST has been bringing to classrooms nationwide for more than 45 years. Thanks to the support of carriers, vendors and the distribution force, InVEST introduced more than 30,000 students to insurance and careers in the industry last year—30,000 potential recruits and insurance shoppers. 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)

- **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

**2020 Big "I" Legislative Conference**  
May 13-15 | Washington, D.C.

**2020 Big "I" Young Agents Leadership Institute**  
Sept. 11-12 | Kansas City, Missouri

If connecting with the industry's future decision makers is a priority, partnering with the Big "I" national Young Agents Committee 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. By supporting the YAC, you can showcase your brand with young professionals who influence thousands of principals, producers and CSRs. Companies have an opportunity to build relationships with the future leaders of the independent agency system.

# Engage decision makers and influencers.

## BIG "I" LEGISLATIVE CONFERENCE.

Network with industry leaders poised to protect the insurance marketplace  
[independentagent.com/events](https://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

### 2020 Big "I" Legislative Conference

May 13-15, Hyatt Regency Washington  
on Capitol Hill  
Washington, D.C.

### 2021 Big "I" Legislative Conference

April 14-16, Renaissance Washington,  
DC Downtown Hotel  
Washington, D.C.

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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Support **INDEPENDENT AGENTS.**