



Independent Insurance Agents  
& Brokers of America, Inc.



# 2018 BIG “I” COMPANY PARTNER INVESTMENT OPPORTUNITIES

# INDEPENDENT INSURANCE AGENTS & BROKERS OF AMERICA

The Independent Insurance Agents & Brokers of America (the Big “I”) represents nearly a quarter million independent insurance agency professionals in more than 26,000 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 **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 agent co-brand designed to help consumers understand the value that an independent agency offers: choice, customization and advocacy.
- Online Referrals:** **TrustedChoice.com** offers a platform for independent agents to help compete for the attention of online consumers.



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## 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 Task Force** educates agents on how to engage and retain emerging markets in their community.

## OUR MISSION:

provide independent agents and brokers  
with a sustainable competitive advantage.



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



Unites independent agents and brokers under one brand

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

Only one brand unites more than 26,000 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 nearly \$2,500,000 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 64,000 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.



Delivers digital handshakes to independent agents

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

- **Leading digital referral generation and distribution platform** in the independent agency channel
- **Organic search generates 70% of traffic, attracting more than 500,000** commercial and personal lines insurance consumers every month
- **Top-ranking content creates online visibility for agents and carriers**, generating 14,000-plus new referrals each month based on business appetite and targeted to preferred agents

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. Subscribing to TrustedChoice.com enables your company to gain targeted, online visibility for the business you want to write and direct it to the agents you prefer. The TrustedChoice.com program is on pace to attract 6 million visitors and generate 150,000 opportunities to independent insurance agents in 2017.

TrustedChoice.com is a trusted insurance resource center for consumers, providing information that helps them make an informed insurance buying decision while also conveying the value of the independent agent – choice, expertise and advocacy. Its digital solutions enable independent agents and carriers to compete in the digital insurance marketplace.

# Shape the future through research and analysis.



## Influence the industry's use of technology and workflow [independentagent.com/act](http://independentagent.com/act)

- **Engages industry innovators** to create best practices for more consistent technology implementations
- **Offers a forum** for companies, agencies, technology providers, associations and user groups to 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 recommendations on e-Signature, customer experience, security, commercial real-time rating, emerging trends, 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.



## 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

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.



## 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

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.

# Attract and Develop the best talent for your distribution force.



- **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

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

Agents, brokers and carriers look to the Big "I" Diversity Task Force 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 task force, made up of agents and company executives, is dedicated to supporting multicultural agency appointments. The task force has been recognized three years in a row as one of the top 25 Diversity Councils in the U.S. by the Association of ERGs and Councils.

Support the award-winning Big "I" Diversity Task Force and help the independent agency population achieve optimal growth and market share on a state and national level.



## 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**, educators and parents in their communities
- **Provides insurance education** resources at no cost to teachers and volunteers on its award-winning, 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.



## Engage a network of future insurance industry leaders [independentagent.com/youngagents](http://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

**2017 Big "I" Young Agents Leadership Institute**  
Sept. 8-9, Chicago

**2018 Big "I" Legislative Conference**  
April 18-20, Washington, D.C.

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.

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.

# Engage decision makers and influencers.



## BIG "I" LEGISLATIVE CONFERENCE

- **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

### 2018 Big "I" Legislative Conference

April 18-20, Grand Hyatt Washington  
Washington, D.C.

### 2019 Big "I" Legislative Conference

May 8-10, Renaissance Washington, DC Downtown Hotel  
Washington, D.C.

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

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.



### 2018 Trusted Choice® Big "I" National Championship

**Daniel Island Club**  
Charleston, South Carolina

Support the third oldest junior golf event in the U.S.  
[BigIGolf.com](http://BigIGolf.com)

The Trusted Choice® Big "I" National Championship provides U.S. youth an opportunity to qualify and compete in a National Golf Championship. Each summer more than 2,000 junior golfers vie to earn a place in the National Championship tournament by qualifying in one of the approximately 100 state and local qualifying events.

Many participants in the Trusted Choice Big "I" National Championship have gone on to become pros including current PGA and LPGA players such as Tiger Woods, Phil Mickelson, Web Simpson, Charles Howell III, Jonathan Byrd, Chez Reevie, Will McKenzie, David Summerhays, Michele Wie, Beth Bauer and Shasta Averyhardt.

# 2018 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 Task Force

Carrier \$10,000  
Brokerage \$5,000



## Agents Council for Technology

Based on employee count

>700 \$10,000  
350-700 \$5,000  
<350 \$2,500



## 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

April 18-20, 2018 and May 8-10, 2019

Platinum: \$50,000+  
Gold: \$20,000 - \$49,999  
Silver: \$10,000 - \$19,999  
Bronze: \$3,000 - \$9,999

## Secure your investment today.

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