



2021 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.

Founded in 1896, 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.

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 as well.

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

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.COM/AGENTS

INDEPENDENTAGENT.COM/STRONGERTOGETHER

- 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 including digital reviews, customizable content including print, digital, social media and video as well as website development resources. And, when the coronavirus pandemic hit, the Trusted Choice team created the COVID-19 Relief Fund distributing 2.5 million to help agents with health insurance, technology and more. Additionally, Trusted Choice created the Stronger Together website to help agents communicate the coverage implications of a pandemic with their personal and commercial clients. 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—their customers.

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.

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



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.

SECURE
YOUR INVESTMENT TODAY.

To learn about investing in TrustedChoice.com
contact Vinnie Savarese at:

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

- 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. Look for the 2020 Best Practices Study Update with analysis of the most recent 268 Best Practices agencies and the new guide to producer contracts. 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

- 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.

ANNUAL PARTNERSHIP INVESTMENT

Annual participation based on written premium

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 and workflows

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 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, data & analytics, 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.

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

- 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

ANNUAL PARTNERSHIP INVESTMENT

Carrier Gold:	\$10,000
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.

In 2020, 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

- 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+
Salutarian:	\$7,500-\$14,999
Honor Roll:	\$2,500-\$7,499

In 2020, Invest celebrates 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 30,000 students to **the insurance business, creating thousands of 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



2021 Big "I" Legislative Conference
April 14–16 | Renaissance Washington,
DC Downtown Hotel Washington, D.C.

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

2021 Big "I" Young Agents Leadership Institute
Sept. 30–Oct. 2 | Kansas City, Missouri

- 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:	\$10,000+
Gold:	\$5,000–\$9,999
Silver:	\$2,500–\$4,999
General:	\$1,000–\$2,499

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

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.

2021 BIG "I" LEGISLATIVE CONFERENCE | APRIL 14-16

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

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

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

Connect with your
DISTRIBUTION FORCE.

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

Support **INDEPENDENT AGENTS.**

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COUNCIL FOR BEST PRACTICES.

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DIVERSITY COUNCIL.

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Brokerage: \$5,000

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BIG "I" LEGISLATIVE CONFERENCE.

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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