



2027 BIG 'I' COMPANY PARTNER SPONSORSHIP OPPORTUNITIES

i

Empowering Trusted Choice®
Independent Insurance Agents.





independentagent.com

CORE VALUES

Every day at the Big "I," our national staff works together to uphold the following core values as we support and advocate for independent insurance agents and brokers.



WE ARE SERVICE-ORIENTED.

Providing value and top-notch service to independent agents and brokers is at our core. We are devoted to exceeding the expectations of our customers—our members—by empowering them with the best tools and resources to thrive and serve their communities. The Big "I" champions our members' interests with enthusiasm and care. We serve so they can succeed. As colleagues, we support each other in doing meaningful work through the giving of our time and resources. The Big "I" enhances lives.



WE ARE COLLABORATIVE.

We are creative problem-solvers who enjoy working together to benefit independent agents. We hire smart, passionate people who embrace different perspectives to help us and our members grow. We lean on our partnerships with industry stakeholders to leverage our collective strength. Our teamwork encourages the sharing of ideas, skills, resources ... and fun.



WE ACT WITH INTEGRITY.

In all we do, the Big "I" is guided by unwavering ethics, honesty and morals. We serve our members with accountability and transparency. We act responsibly and reliably. We prove our integrity every day by doing what is right and not what is easy.



WE VALUE INNOVATION.

We embrace change and seek ways to improve and advance in a constantly evolving insurance industry and marketplace. We strive relentlessly to strengthen the independent agency system through different technology, strategies and solutions for our members—both agencies and state associations. The Big "I" is a culture of creativity and continuous improvement.



WE ARE RESPECTFUL.

We value the contributions of all Big "I" members and staff. We treat people with dignity, courtesy, and kindness—regardless of differences in opinion, background or beliefs. We respect each other's time and work. We welcome and encourage different points of view in everything we do.



BIG 

 **Trusted Choice**
INDEPENDENT INSURANCE AGENTS

HOW WE HELP INDEPENDENT AGENTS.

The Big “I” equips independent agents with the tools, insights and connections they need to grow and to adapt in a changing marketplace. From marketing and talent development to research and advocacy, we help agencies stay competitive, relevant and ready for what’s next.

For company partners, that means stronger agencies, better-performing books of business and a more resilient independent agency system.

BRANDING & MARKETING.

Helping agencies attract and retain clients in an increasingly competitive marketplace.

We provide modern marketing tools, education and support that help agencies strengthen their brand, connect with customers and grow profitably.

TALENT PIPELINE.

Building the next generation of agency leaders and ensuring long-term continuity for the channel.

From recruiting and training to perpetuation planning, we help agencies develop talent and create a sustainable future for their business.


RESEARCH & ADVOCACY.

Providing the insights and influence agents need to navigate change and protect their business.

We deliver industry-leading research, technical expertise and legislative advocacy that empower agents to make informed decisions and operate with confidence.

Learn more at independentagent.com

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 Big I Independent Agents



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



Helps independent agents grow their business with expertly crafted marketing resources.

[TRUSTEDCHOICE.INDEPENDENTAGENT.COM](https://www.TrustedChoice.IndependentAgent.com)

EMPOWERING THE INDEPENDENT AGENCY CHANNEL.

- Helps independent agents market their value and connect with consumers.
- Provides marketing resources, communications toolkits and digital support for agencies.
- Enhances visibility for participating carrier partners through consumer-facing initiatives and the Trusted Choice agency locator.

ANNUAL PARTNERSHIP INVESTMENT

Annual participation based on every \$100 of property-casualty written premium:

First year: 50¢

Second year (& beyond): 1¢

Minimum: \$5,000

Maximum: \$450,000

Trusted Choice® strengthens the independent agency channel by helping agents better market their value, connect with consumers and grow their business. Across approximately 24,000 agency locations, the program supports a unified mission: empowering independent agents to communicate the advantages that set them apart—choice, customization and advocacy.

Trusted Choice acts as a marketing partner for agencies, providing tools and expertise that are often beyond the scope of internal resources. From website analysis and customizable marketing materials to ready-to-use social media content and strategic guidance, the program helps agencies enhance visibility, strengthen customer engagement and compete more effectively.

Agents also gain access to practical marketing and communications toolkits focused on issues impacting the industry and their communities. Resources include public relations support, social media templates, digital marketing guidance, artificial intelligence and consumer awareness campaigns on topics such as legal system abuse and other marketplace challenges affecting insurance affordability and availability.

The new TrustedChoice.com, free to all Big “I” members, connects insurance shoppers with independent agents through the online agency locator, while highlighting participating carrier partners and the value of the independent agency system. These tools help drive awareness, visibility and consumer engagement across the channel.

WHY COMPANIES INVEST

Supporting Trusted Choice is an investment in a stronger, more visible independent agency channel. Company partners help agencies better connect with consumers, reinforce the value of independent distribution and increase visibility for the carrier brands that support it.





SHAPE
THE FUTURE
THROUGH
RESEARCH
& ANALYSIS

BEST PRACTICES.



Create a 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.

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 from leading agencies and influence the future direction of the program. Sponsors are invited to education, event and networking opportunities.

In 2025, an elite group of Best Practices agencies was appointed following a nomination and data submission process. These agencies form the foundation for the 2025 comprehensive study and the 2026 and 2027 updates, ensuring benchmarking data remains current. The Council for Best Practices will meet in January 2027 alongside the Big "I" Winter Meeting to focus on education, marketing and strategic planning for the next three-year cycle, slated to begin in late 2027.

FUTURE ONE.



Lead industry research and government affairs.

[INDEPENDENTAGENT.COM/AGENCYUNIVERSE](https://independentagent.com/agencyuniverse)

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

Future One brings the industry's top stakeholders together for two critical purposes: industry research, and 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.

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:

< \$250 M: \$3,000	\$250-\$600 M: \$6,000
\$600-\$750 M: \$12,000	\$750 M-\$1 B: \$18,000
> \$1 B: \$26,000	



AGENTS COUNCIL FOR TECHNOLOGY.



Aligning the industry around technology shaping the future of distribution.

[INDEPENDENTAGENT.COM/TECHNOLOGY](https://independentagent.com/technology)

BE PART OF THE INDUSTRY'S TECHNOLOGY LEADERSHIP COMMUNITY

Join the industry's leading collaborative technology community focused on helping independent agents thrive through smarter connectivity, better data, and responsible innovation. The Big "I" Agents Council for Technology (ACT):

- Brings carriers, technology providers and agents together in a neutral, collaborative forum.
- Drives alignment on data, connectivity and artificial intelligence (AI).
- Helps agencies adopt technology that improves efficiency, service and growth.

ANNUAL PARTNERSHIP INVESTMENT

All pricing based on employee count:

Carriers:	Technology Providers:
<350: \$5,000	<35: \$3,500/\$5,000
350-700: \$7,500	35-70: \$7,500
>700: \$12,500	>70: \$12,500

Active Subsidiary Brands:
\$2,000 flat fee per brand
(Fees capped at three subsidiaries)

For more than 25 years, ACT has led the industry's most important technology conversations—bringing together carriers, technology providers and independent agents to collaborate on shared challenges and opportunities.

Today, that work includes helping the industry move from exploring artificial intelligence (AI) to applying it in meaningful, responsible ways. ACT focuses on practical use cases including workflow efficiency, client communication and data utilization while also addressing governance, risk and long-term impact.

Through work groups, webinars and industry engagement, ACT delivers insights and resources that help agencies better understand and adopt emerging technologies. Key focus areas include data, connectivity, artificial intelligence and the people and processes needed to support long-term success.

ACT provides a seat at the table where industry technology priorities, including AI, are shaped. Company partners gain direct access to agent perspectives, influence key conversations and help guide how emerging technologies are applied across the independent agency channel. It's an opportunity to collaborate while shaping the future of how technology supports agents and brokers.



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

DIVERSITY & INCLUSION.



Enhance agency value through diversity.

[INDEPENDENTAGENT.COM/DIVERSITY](https://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 a thought leader across the independent agency channel and beyond on diversity and inclusion principles and best practices.
- Offers diversity-focused resources, mentorship opportunities, and virtual training programs.
- Includes representation on the Diversity Council, allowing meaningful participation in Council activities.

ANNUAL PARTNERSHIP INVESTMENT

Carrier Partner: \$12,000

Carrier Subsidiary Brand: \$2,500

Brokerage: \$5,000

Shape the future of diversity and inclusion programming with a seat on the Big "I" Diversity Council. 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 Big "I" Diversity Council provides a comprehensive suite of resources, including a new online platform with 100+ courses in 12 languages. Through programs like the Right Start Training Series, mentorship opportunities, and the Inclusion in Action newsletter, the Council supports connection, growth, and ongoing industry insights.

INVEST PROGRAM.



Attract top talent to the independent agency channel.

[INVESTPROGRAM.ORG](https://investprogram.org)

- Provides insurance education curriculum for schools nationwide.
- Creates resources to help independent insurance agents attract and retain talent.
- Connects insurance professionals with local educators and aspiring talent.
- Offers Invest graduates scholarships for college, insurance licensing and designation courses.

ANNUAL PARTNERSHIP INVESTMENT

Industry Champion: \$20,000+

Talent Accelerator: \$15,000

Learning Advocate: \$10,000

Education Supporter: \$5,000

Invest is proud to advance its mission of providing insurance and risk management education to students nationwide. With the support of insurance carriers, independent agencies and the industry at large, Invest has introduced more than 35,000 students to the business of insurance and continues to grow its national footprint.

Invest helps promote the independent agency channel and the wide range of rewarding careers across the insurance industry by implementing educational programming in high schools, community colleges and workforce development programs.

Support Invest, a 501(c)(3) nonprofit organization and help build a stronger future workforce while creating more informed insurance consumers.

- 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

A la carte sponsorship opportunities available for Platinum and Gold sponsors:

Platinum: \$12,500

Gold: \$7,500

Silver: \$5,000

INSURANCE CAMPAIGN INSTITUTESM

- Develops future industry leaders who understand insurance and public policy.
- Expands the independent agency system's influence at the state and federal levels.
- Strengthens the industry's voice through elected officials with real-world experience.

INVESTMENT LEVELS

Ambassador: \$25,000

- Seat on Institute Advisory Committee
- Prominent name and logo recognition
- Two attendees at program events

Partner: \$10,000

- Prominent name and logo recognition
- One attendee at program events

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), comprised of volunteer leaders from around the country, 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.

Build the next generation of insurance advocates in public office.

[INDEPENDENTAGENT.COM/GOVERNMENTAFFAIRS](https://independentagent.com/governmentaffairs)

The Insurance Campaign InstituteSM is a hands-on, one-day campaign training designed for insurance professionals interested in running for public office. Participants gain practical knowledge from current elected officials and leading political strategists on how to build and run successful campaigns.

The program covers essential campaign elements, including organization, fundraising, grassroots engagement, polling, media relations, social media, public speaking, debate preparation and coalition building—equipping attendees with the tools to lead both on the campaign trail and in public office.

Supporting the Insurance Campaign InstituteSM helps cultivate a pipeline of industry advocates who understand the role of insurance in their communities and can influence policy decisions for years to come. It's a strategic investment in long-term advocacy, leadership development and the future strength of the independent agency channel.

BIG "I" LEGISLATIVE CONFERENCE.

Network with industry leaders poised to protect the insurance marketplace.

INDEPENDENTAGENT.COM/EVENTS

ENGAGE DECISION MAKERS

The annual 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

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. Agents visit over 400 congressional offices during the pilgrimage to the nation's capital.

Attendees will be briefed on issues important to the industry to take to their representatives. The power-packed program includes presentations from prominent political speakers, industry insights from Big "I" leadership, ample time to lobby on Capitol Hill and the presentation of various Big "I" awards. 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 exposure to the industry's most influential independent agents and brokers and impact federal legislation.

2027 BIG "I" LEGISLATIVE CONFERENCE



2027 Big "I" Legislative Conference
April 7-9, 2027



Westin Washington, D.C.
Downtown

SAVE THE DATE FOR 2028!



2028 Big "I" Legislative Conference
April 26-28, 2028



Westin Washington, D.C.
Downtown

2027 BIG "I" COMPANY PARTNER ANNUAL INVESTMENT OPPORTUNITIES

TRUSTED CHOICE®.

For every \$100 of property & casualty written premium

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

YOUNG AGENTS.

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

COUNCIL FOR BEST PRACTICES.

Annual investment opportunities vary
by individual company involvement

DIVERSITY COUNCIL.

Carrier Partner: \$12,000
Carrier Subsidiary Brand: \$2,500
Brokerage: \$5,000

AGENTS COUNCIL FOR TECHNOLOGY.

All pricing based on employee count

Active Subsidiary Brands
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INVEST.

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FUTURE ONE.

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

INSURANCE CAMPAIGN INSTITUTESM.

Ambassador: \$25,000
Partner: \$10,000

Beth Montgomery
Vice President, Company Relations
beth.montgomery@iiaba.net
independentagent.com/companypartners

SECURE YOUR INVESTMENT TODAY.



ABOUT THE BIG "I".

The Independent Insurance Agents & Brokers of America (the Big "I") is the leading national association for independent insurance agents and brokers. For more than 125 years, we've helped agencies build a sustainable competitive advantage through advocacy, education, market access and business support.

With a federation of 51 state associations and approximately 24,000 agency locations, the Big "I" represents one of the largest and most influential distribution channels in the insurance industry. Our members offer

choice, customization and advocacy to their clients by representing multiple insurance carriers.

Guided by agent leadership from across the country, the Big "I" works to protect and strengthen the independent agency system—through effective advocacy, industry research and programs that support agency growth and long-term success.

Partner with the Big "I" to strengthen the independent agency channel.





BIG 



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127 S. Peyton Street, Alexandria, VA 22314