

YOUNG AGENTS STATE LIAISON TOOLKIT

The purpose of this toolkit is to provide state association staff and volunteers the tools and resources needed to attract and engage young professionals to perpetuate the future of the industry.

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WELCOME TO YOUR **ONE-STOP-SHOP** FOR ALL THINGS YOUNG AGENTS.

This toolkit is divided into **five** sections:



- 1 Getting Started**
Understand the purpose of a Young Agents Committee, create a mission, learn how to recruit new members, and gain support from your board.
- 2 Hosting an Event**
Gather information needed to host an event such as finalizing an agenda, finding speakers, marketing your event, and finishing the final touches.
- 3 Outstanding Young Agents Committee Awards**
Read about the award application process, requirements, award categories, and tips for completing your application.
- 4 Activities Hosted by the National YAC**
Learn more about the events being hosted by the National YAC in the upcoming year.
- 5 InsurPac & GIVE**
Want to get more involved? Learn about InsurPac & GIVE and ways you can contribute directly from your state.

**GETTING
STARTED.**

AN OVERVIEW OF A YOUNG AGENTS COMMITTEE.

A Young Agents Committee needs a few things in order to succeed: Members, a mission and goals, funding, and support from the state association staff and board.

FINDING MEMBERS FOR YOUR COMMITTEE

Committee positions can mirror your state association board, the Big “I” National Young Agents Committee (YAC) or be more loosely defined – it’s really what works best for your state. At a minimum, you will want a Chair and Chair-Elect position to help maintain program consistency.

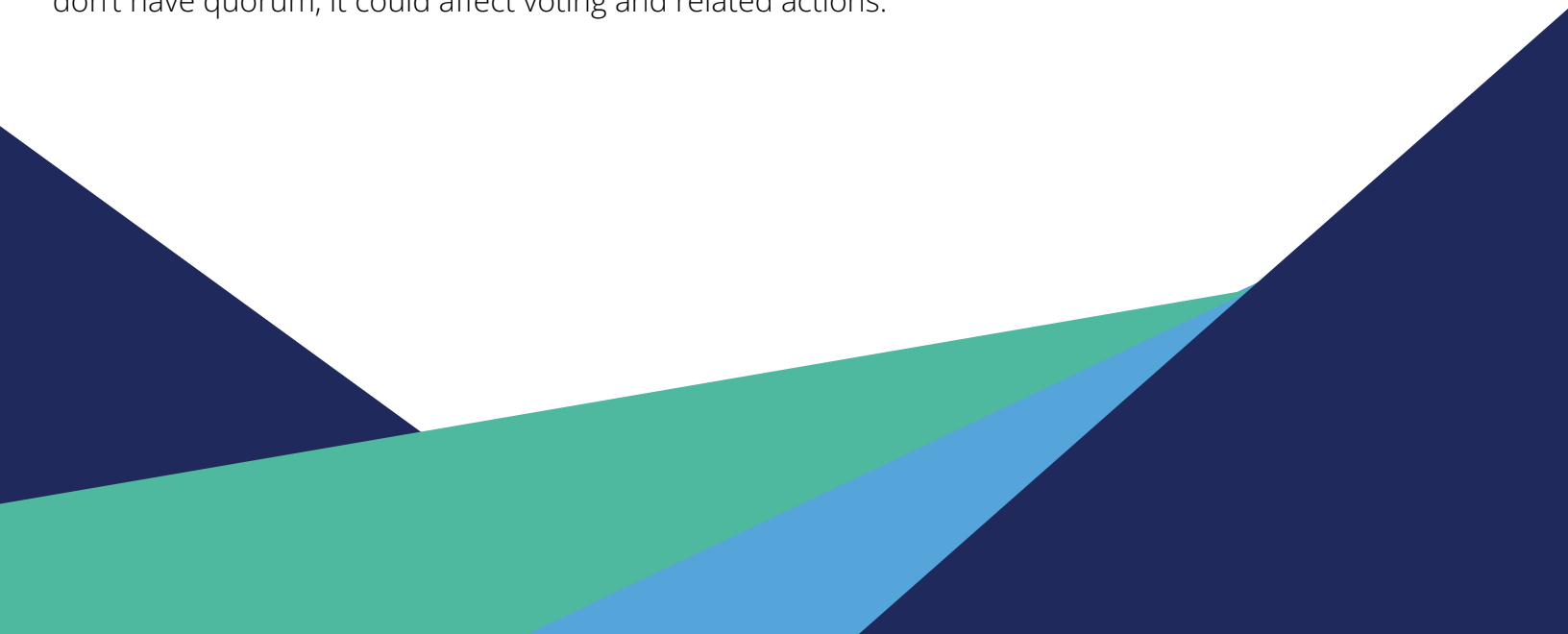
Other potential positions include:

- Vice President
- Secretary
- Treasurer

Often the more administrative roles (secretary and treasurer) are filled by association staff with committee oversight.

Depending on the committee’s events and activities cycle, it may be best to have multiple-year terms. This gives volunteers a chance to really connect with the mission and implement program enhancements. Your election process will have to adhere to your state’s bylaws.

There is no right or wrong amount of members to have on your committee. You want enough members to achieve a fair representation of your constituents, but not so many that meetings are unmanageable. You might start with four members and add more as your activities and fundraising needs grow. Look to your state board for guidance. Be sure to check your association’s bylaws for voting requirements. A larger committee can make it harder to get full attendance at meetings. If you don’t have quorum, it could affect voting and related actions.



ASSIGNING COMMITTEE REPRESENTATIVES

No two state Young Agents Committees will look alike. Some committees are wholly appointed by the state board, while others find a regional approach is more effective. You can divide your state based on local boards, and if you don't have local boards, create manageable geographic regions. Create committees with a representative from each region who acts as the main liaison to Young Agents in that area. This system ensures your members are fairly represented and makes marketing and division of duties easier.

Whether your committee uses a regional approach or simply selects the most motivated Young Agents, make sure duties and roles are clearly defined. Young Agent outreach should be an important part of their job description. Member-to-member communication is most effective, and when you deliver a marketing message, have committee representatives follow-up with the same group of agents throughout the year to help build rapport.

Pro Tip: Sub-committees and workgroups are a great way to get more Young Agents involved and can help lighten the workload. You can create small working groups with a very clear charge. For example, planning a community service project. This gives your committee an opportunity to introduce Young Agents to the Big "I" and engage more participants.

STATE SPOTLIGHT

The Young Agents Council of the Florida Association of Insurance Agents has Zone Coordinators. The Young Agents Council is divided into 11 Zones. Each Zone has one or more volunteer coordinators who help organize, plan, and execute events in their regions.

ONBOARDING NEW MEMBERS

While it may seem like a rerun to seasoned YAC members and staff, the beginning of each new term requires an orientation for new committee members. If you've engaged Young Agents in other volunteer activities, they should be somewhat familiar with the committee's charge. But orientation enables you to lay out the guidelines and commitment.

Create a job description or Roles & Responsibilities document that outlines the level of commitment you expect from each committee member. Include things like: What meetings they must attend, what outreach is required, and what the time commitment looks like.

CORRESPONDING DOCUMENT

[Click here](#) to access an editable version of the National YAC Roles & Responsibilities document. Feel free to update and amend to fit your state's needs.

INVOLVING COMPANY REPRESENTATIVES

Some YACs have company representatives on their board. These committee members may or may not have voting power, but can provide important insights into a critical part of the industry. Whether your state includes company representatives on volunteer committees or not, leveraging company relationships can play a key role in your overall marketing strategy.

Provide company partners that sponsor your program with marketing materials about your program and events – even a small promotional business card can be an affordable way to promote your programs. The partner will see this as a value add to their sponsorship and your materials and messaging will reach agents you may not otherwise be able to reach.

CHARGING PARTICIPATION DUES

To charge dues or to not charge dues, that is the question. Some states charge Young Agents a fee to participate in the Young Agents program. They find that dues encourage a level of commitment from Young Agents who are more inclined to participate in something in which they have made an investment. The fee may include admission to key events or simply be a small stipend to get buy-in and help with program administration.

STATE SPOTLIGHT

The Florida Association of Insurance Agents charges Young Agents a \$50 fee to be part of the program. This fee covers the cost to host events and serves as a “buy-in” for members. Charging a small fee has increased overall attendance at Young Agents events in their state since they have implemented the fee.

MAKING A MISSION STATEMENT

Your committee will need a guiding statement that will help define how they serve and lead other Young Agents in your state. The following is an example of a mission that could be for a new or existing Young Agents Committee (YAC).

“The mission of the Young Agents program is to help emerging insurance professionals, or those new to the industry, cultivate skills for a successful career by engaging them in association activities. As a member, you will create opportunities for young professionals to enhance personal growth through education, achievement, leadership development, legislative involvement, and professional networking skills.”

Another important piece of your mission is who you are serving, meaning **how do you define a Young Agent?** The Big “I” national definition of a Young Agent is someone who is 40 years or younger or has less than 5 years in the industry, your state can choose to identify different audience specifications as you best see fit.

STATE SPOTLIGHT

The Young Agents of Big I OK mission statement is, “The mission of the Oklahoma Young Agents Committee (YAC) is to promote the professional growth of Young Agents, provide service to association members and support the Independent Insurance Agents of Oklahoma in its endeavors. It will engage in activities and projects designed to recruit and involve the future leaders of our association. It supports an environment whereby its members can voice their opinions and suggestions with regard to the independent agency system.”

CREATING GOALS FOR THE COMMITTEE

Goals help ensure the committee is working toward something actionable and attainable. The following are some sample goals that could be implemented or adapted for your YAC:

- Host a golf tournament in the spring with 200 participants and raise at least \$5,000 for Make-A-Wish through registration fees.
- Participate in the Big “I” national Legislative Conference and Young Agents Leadership Institute by sending the Chair and Vice Chair to each event.
- Organize two Young Agents Speed Networking events this year, one for the east region and one for the west region, with 50 participants at each event.

The goals you create will most likely differ from year-to-year as new leadership guides your committee forward. Some goals may be evergreen – like consistently offering opportunities for emerging leaders to connect with others.

It is important to take time as a committee to create goals and write them down at the start of a new term. This ensures accountability within the group and provides metrics to accomplish as a committee.

CORRESPONDING DOCUMENT

[Click here](#) to download a goal setting worksheet. It can be used as a template for goals for the full committee or split between members.

FUNDING YOUR COMMITTEE ACTIVITIES

Depending on your state’s company partner sponsorship process, your YAC may need to raise funds to supplement expenses for events and education. Before reaching out to company partners, work with your state’s company relations staff member to determine investment levels and sponsorship benefits. When it’s time to make “the ask,” assign prospective company contacts to members of the YAC who have a relationship with the company or vendor. Once a company has made a commitment, be sure to provide return on investment updates including brand impressions, number of attendees at events, photos and more.

Touch base with companies regularly, including scheduled calls from committee members. The National YAC will host a Company Partner update twice a year to provide companies with information on current activities and how their investment has supported the development of young professionals.

Helpful fundraising tools:

Write talking points about program activities to create customizable emails for committee members to send out to companies.

- Track your company contacts, touch points, and funding history in a database, such as Excel or OneNote.
- Create a webpage or flyer outlining your sponsorship opportunities.
- Write talking points about program activities to create customizable emails for committee members to send out to companies.

CORRESPONDING DOCUMENT

[Click here](#) to view the Young Agents Company Partner Opportunities Guide. Have any questions about the guide? Contact [Jamie Behymer](#).

GETTING SUPPORT FROM YOUR STATE ASSOCIATION BOARD & STAFF

Buy-in. Skin in the game. There are plenty of cliché meanings of 'early adoption' and that's exactly what you need from your association's leadership to create or revitalize a Young Agents program. The first step to doing so: Define your goals and share them with other association staff members and leadership. Gaining the support for your group's mission and goals is vital. Many leaders will welcome getting their agency's Young Agents involved in the Big "I" when they know more about the benefit of the program. Often, state leaders have already committed years to the mission of the organization and their legacy depends on Young Agents getting involved to perpetuate and secure the future of the association.

BUILD YOUNG AGENT MEMBER PROFILES.

Big "I" membership is at the agency level, getting contact information for new Young Agents can be a daunting task, but a clear communication strategy can help. Rely on your state association's Big "I" Board and committee members, other active Young Agents, agency principals, and Young Agents program alumni to provide contact information for Young Agents in their offices.

Depending on the makeup of your state, Young Agents' information will be entered into an agency management system or other database. This inclusion often gives these Young Agents access to other association benefits like state and national e-newsletters as well as the Big "I" Virtual University and Ask An Expert service. Focus on these selling points when soliciting the data.

Over time, a YAC can build a meaningful profile of each Young Agent. Collect the data via an online form that each person can complete themselves, over the phone, or through agency visits. Helpful information to gather may include: social media handles, cell phone numbers, and email addresses. Event and education attendance, volunteer roles, and agency visits are also helpful to track.

Once the YAC is full-speed ahead, send a survey to all Young Agents to help leadership understand their expectations of the program. The results can then be used to help form the association's strategic plan and put emerging leaders at the forefront of these discussions.



THREE STEPS TO BUILD MEMBER PROFILES.

RECRUITING MEMBERS

- Visit agencies to recruit Young Agents (visits by state staff, volunteers, or company partners)
- Use testimonials from current Young Agents about involvement in association activities and utilize online videos and/or social media to help the recruitment process
- Conduct a joint event with another organization (chamber, association, fraternity/sorority, college, etc.) and use the association website for Young Agent promotion
- Promote association membership/Young Agent involvement to newly licensed agents
- Create targeted messaging for agency principals on the value of Young Agent activities
- Work with carrier reps to promote Young Agent activities and involvement
- Create a page on your state association's website about your Young Agents program
- Download a list of L&H or P&C agents in your state to grow your outreach list. There is a small fee associated with downloading each list.

STATE SPOTLIGHT

The Alabama Independent Insurance Agents Association (AIIA) hosts multiple licensing classes through their state association. The Alabama YAC will send letters out to newly licensed agents to create connections with activities occurring at the state-level and invite them to participate in upcoming events.

RETAINING MEMBERS

- Hold a new member welcome or orientation event (online or in conjunction with another in-person event)
- Send a new member welcome email or snail mail packet
- Assign committee members/state YAC liaisons to make phone calls welcoming Young Agents and inviting them to events
- Host recurring calls, webinars, and virtual education events
- Recognize new Young Agents via a listing on your state website, in an article, at an event, etc.

ENGAGING MEMBERS

- Feature a Young Agent profile in a state or industry magazine
- Present a Young Agent of the Year award
- Have a Young Agent booth or host an event in conjunction with a state association event
- Offer a mentorship program to new Young Agents
- Ask new Young Agents to volunteer in committee and/or association activities

**HOSTING
AN EVENT.**

INTRODUCTION.

If your state already hosts an annual conference, this is an excellent opportunity for the Young Agents Committee to shine! Many YACs host education and networking events in conjunction with a state conference. Some host a standalone event with great success, and others join forces with nearby states to host regional events, pooling resources and consolidating efforts. Determine what works best for your Young Agents and build programming that will resonate with them. Agency principals may prefer to send their Young Agents to an event that offers CE or to see a top-notch sales speaker that will increase their bottom line.

EVENT DEVELOPMENT & PROCEDURES.

From the planning stage to execution of an event, here is everything you need to know to host something for Young Agents!

STEP 1: CHOOSE AN EVENT TYPE

Come up with an event idea or theme. For example, your event could focus on sales and leadership, legislative involvement, continuing education, workforce development, or an opportunity for attendees to network. Determining your event content is the most important part of the planning process.

STEP 2: DETERMINE THE SIZE & SCOPE OF YOUR EVENT

Ask yourself Who will this event serve? Will this event be open to all Young Agents across your state? Or is it just for YAC leadership? Will it be a local, regional, or statewide event? Is it planned for one day or will it be a multi-day event? Will you be partnering with another state to host a larger multi-state event? You could either create a standalone meeting for Young Agents or host a Young Agents track in conjunction with your state conference. Whatever works best for your state!

STATE SPOTLIGHT

In 2024, the Young Agents of Big I Oklahoma and the Kansas Association of Insurance Agents co-hosted the Young Agents Trailblazing Excellence Conference.

STEP 3: FIND A LOCATION

Once you have determined the length of your event and anticipated number of attendees, you will need to select a venue.

A few things to keep in mind as you look for a location:

- **Venue:** The earlier you book, the better. Eight months is usually the ideal time frame to book because it gives you enough time to secure speakers, create the website, and promote registration.
- **Service & Amenities:** It is important to know what is included within your contract and available to you for your event. Some questions to ask your event planner at the venue:
 - Do you have a kitchen? Can you provide catering for the event?
 - If yes, are there any food and beverage minimums?
 - Do you provide tables, chairs, and linens? Are there any additional fees associated with furniture or linens?
 - Will there be a dedicated setup/cleanup crew?
 - Does the space have A/V capabilities? If yes, what can be done?
 - Will we be able to put a 24-hour hold on the room (if applicable)?
 - What is the room capacity?
- **Layout:** A venue that is easy to navigate is very helpful for attendees. When looking at a space, keep the flow of traffic in mind.
 - Are there any areas that might be prone to congestion?
 - Is a room or door hidden in a corner?
 - Will certain signage be needed?
 - If you're having a stage for a keynote speaker or bar for a happy hour, you will want to make sure you have enough space for this in the area you choose.
- **Accessibility:** Having an accessible event is crucial. It ensures all attendees can fully utilize the building and its amenities. While you might not know the needs of your attendees when you book the location, it's important to anticipate potential accommodations and identify any areas for change accordingly.

STEP 4: FINALIZE YOUR AGENDA

Once your venue is secured, it's time to finalize your schedule. Develop a schedule that offers valuable takeaways for agents to implement in their agencies. A mix of different types of sessions can be helpful for attendees to keep their attention. For example, you could start the day with a keynote speaker, then a panel, and then roundtable discussions as groups.

It is recommended to include at least one event/mixer with Young Agents, sponsors, and state association staff. This gives attendees the chance to connect with one another and identify potential opportunities for collaboration.

STATE SPOTLIGHT

In 2024, the Young Agents of Iowa hosted a Young Agents Conference. The agenda included a session with a speaker from the Iowa Insurance Division, workshops on AI (artificial intelligence), how to become a "Blue Lobster" and stand out in your marketplace, digital marketing playbook, and E&O Risk Management. There was also a Young Agent Panel with members of the National YAC and emerging leaders from surrounding states and an evening mixer at Putts & Pins.

STEP 5: FIND SPEAKERS

Agency principals may prefer to send their young agents to an event that offers CE or to see a topnotch sales speaker that will increase their bottom line. Panels or attendee generated content can provide very affordable programming– often free or a complimentary registration is all it takes. They also allow your Young Agents and sponsors a chance to shine. New agency owners can share the ups and downs of buying or starting an agency. Vendors and service providers may sit down with Young Agents to talk about how to leverage technology, market better, or find a niche. Additionally, timed, themed table discussions can give young agents a chance to connect and ask and answer questions to help them thrive.

The Big “I” National YAC has created a database of speakers who have presented previously at the Young Agents Leadership Institute. These individuals range from keynote speakers to workshop leaders. You can review their full list of speakers, session topics, and pricing. Please note: Pricing is based on the rate at the time of booking. Rates may be different in today’s market.

CORRESPONDING DOCUMENT

[Click here](#) to view a speaker database of previous presenters at the Young Agents Leadership Institute.

STEP 6: MARKET YOUR EVENT

Develop an attendee prospect list and create custom marketing messages. Target marketing efforts to agency principals and leadership to encourage Young Agent attendance. It can also be helpful to offer scholarships for first-time attendees or a reduced registration rate. “Early bird” pricing can entice individuals to get registered and save.

Share the event information with your Communications team (if applicable) to begin posting on social media. Sending personal invites to Young Agents will also go a long way!

State Spotlight: Prior to their EPIC Conference, the YAC Chair at the Alabama Independent Insurance Agents Association (AIIA) sent a letter to all member agencies explaining the conference, key takeaways for attendees, and benefits of emerging leaders participation.

STEP 7: FINISH THE FINAL TOUCHES

Your event is almost here! As the weeks wind down and the day approaches, finish the final “to dos” to make your event a huge success. The list below can be used as a guide to help you with any last minute items, but you can also make your own!

- Confirm YAC assignments, volunteer roles, and responsibilities
- Confirm food and beverage selections
- Confirm room set-ups and A/V needs
- Confirmed sponsorships and partner attendance
- Confirm all session speeches, slideshows, and any corresponding resources
- Confirm signage and printed materials
- Confirm and order giveaways and prizes to present throughout the event
- Confirm decorations and displays

STEP 8: EXECUTE YOUR EVENT!

You've done the planning and preparation, it's time for ideas to take action! Get ready to see all of your planning and hard work come together! To help event operations run smoothly, you can assign members of your Young Agents Committee with roles and responsibilities to "own" throughout the event. These tasks will be their job to oversee. If there are any issues or assistance needed, then they will come to you.

CORRESPONDING DOCUMENT

[Click here](#) for a list of example YAC assignments/volunteer roles and responsibilities during an event. This can also be used as a day of checklist.

STEP 9: POST-EVENT ENGAGEMENT

You can take a deep breath because the event is done! There are a few things following the event that we recommend doing to retain momentum:

Send out any presentations, notes, or speaker takeaways in a follow-up email. These documents are materials that attendees can share with their agency principals and leadership that show meaningful engagement from the event.

Send out a post-event survey. It's important to get feedback from attendees on what went well and areas for growth for future events. You could even offer an incentive for completing the survey. Those who submit a response will be entered into a drawing to win a free registration for next year's event! Share the ROI (return on investment) with sponsors. Information that is valuable to share includes the total number of attendees and first-time attendees, the number/dollar amount of any scholarships distributed (if applicable), and agencies/businesses represented. If there was a fundraising component, the total amount of dollars raised would be an impactful metric to share as well.



**OUTSTANDING
YOUNG AGENT
COMMITTEE
AWARDS.**

BACKGROUND

Each year, the Big “I” National Young Agents Committee recognizes state Young Agents groups that are leading the charge with innovative ideas and a passion for solidifying the future of the independent agency system. The goal is to help your state cultivate and inspire the next generation of independent agents and thought leaders while bringing together a community of emerging leaders to share ideas, new opportunities, and innovative practices with your peers.

PROCESS

The application for the 2026 awards is due on June 12, 2026. The application is composed of six sections:

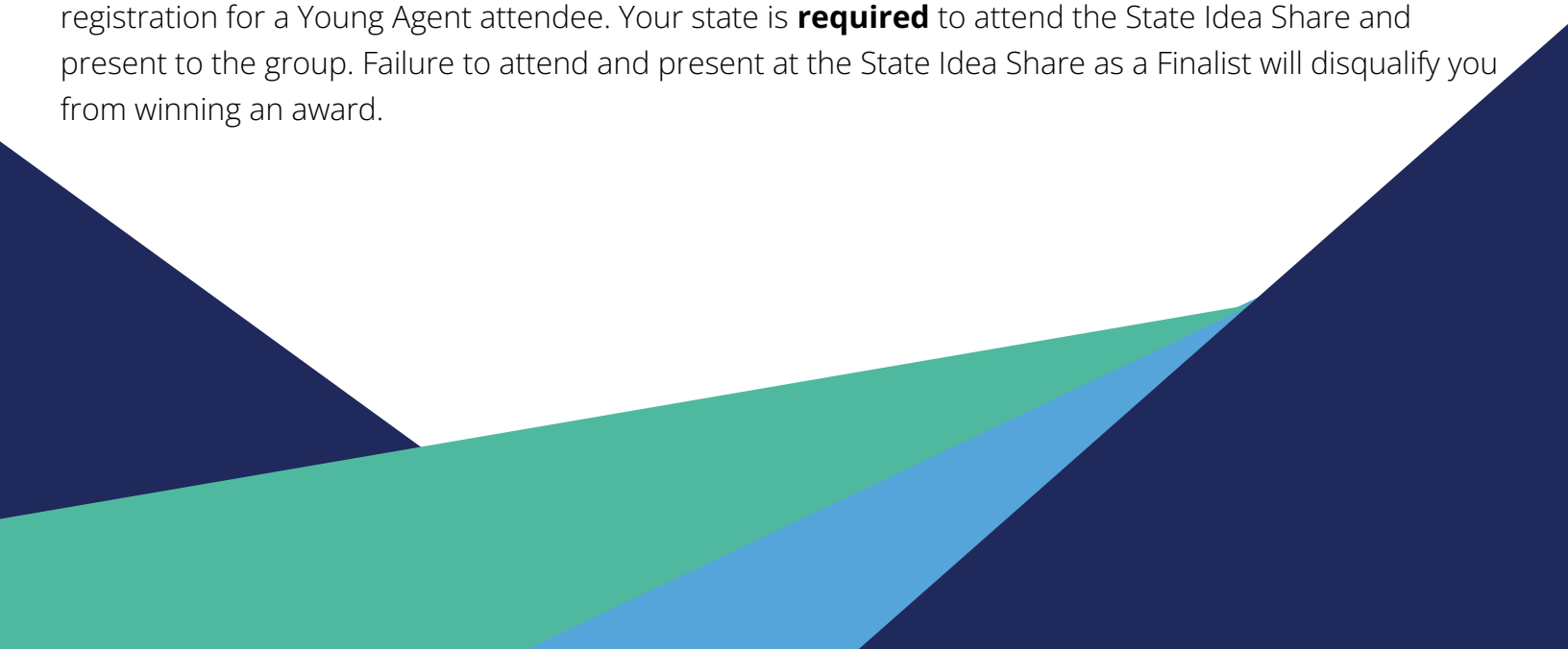
- Community Service
- Membership Development
- Political Involvement
- Workforce Development (formerly Invest Supporter)
- Young Agents Meeting
- Outstanding YAC of the Year

At the discretion of the National YAC, the following two awards may also be presented: Breakthrough YAC of the Year and Innovator of the Year. The National YAC may also decide to present more than one award for each category based on the judging criteria. The award categories are described in additional detail below.

REQUIREMENTS

The [Outstanding Young Agents Awards](#) are presented during the Young Agents Leadership Institute (YALI) each fall. Prior to YALI, any state that submitted an application will be notified if they are a finalist for the award category. This change by the National YAC started in 2024. It provides multiple states the opportunity to share their award-winning strategies during the State Idea Share at YALI.

If your state is selected as a finalist for an award category, you will receive one (1) complimentary YALI registration for a Young Agent attendee. Your state is **required** to attend the State Idea Share and present to the group. Failure to attend and present at the State Idea Share as a Finalist will disqualify you from winning an award.



AWARD CATEGORIES

Community Service: For outstanding achievement in a project that benefits the community. For this award category, describe the process of how you identified a community need and a project that would serve those around you. Share any details on who was involved, how much funds/goods were raised, and the lasting impact the project will have on the community.

Membership Development: For excellent achievement in recruiting and maintaining Young Agent participation in association activities. This award specifically focuses on the development of emerging leaders in your state. Include any engagement strategies your YAC has used to recruit new agent members. Describe any events or activities that you have led to keep retention of current members. Share how you grew the Young Agents program and any campaigns that were used to grow the program.

Political Involvement: For outstanding achievement in Young Agent participation in the legislative process. Explain how your committee educates Young Agents about the importance of the legislation and political process. Provide any details or examples of ways your Young Agents have been involved in raising funds for InsurPac.

Workforce Development (formerly Invest Supporter): For outstanding achievement in educating, training, and sustaining the current and future of the industry. In this category, highlight any general workforce development initiatives Young Agents are leading in your state. Include information about recruiting and training new talent, For example: Hosting pre-licensing events, inviting newly licensed agents to a Sales & Leadership Conference, implementing the Invest program in high schools, participating in career fairs, etc.

Young Agents Meeting: For excellence in providing and promoting an annual Young Agents meeting. Describe aspects of the meeting and how they positively impact emerging leaders who attended and their future in the independent agency system. Share any successes with marketing and fundraising campaigns. Provide details about the educational opportunities offered and examples of ongoing engagement with attendees.

Outstanding YAC of the Year: In recognition of the outstanding efforts of a state Young Agents Committee to foster association growth and secure a future in the independent agency system.

Breakthrough YAC of the Year: Selected by the National YAC and presented at their discretion, this award recognizes the efforts of a committee that has gone above and beyond in serving their Young Agent members.

Innovator of the Year: Selected by the National YAC and presented at their discretion, this award is presented to a state in recognition of their innovative ideas and perseverance when serving their Young Agent members.

[Click here](#) to view all previous winners of YAC awards.

INDIVIDUAL AWARDS

There are two additional awards given out each year to individuals: Young Agent of the Year and State Liaison of the Year.

Young Agent of the Year: This award recognizes a Young Agent who provided exemplary service to their state association, their community, and/or the industry. Nominations are encouraged to be submitted by state association staff, state national directors, company partners, young professional peers, etc. This award is presented during the Emerging Leaders Luncheon at the Legislative Conference each spring.

State Liaison of the Year: This award recognizes one state association staff person who has provided outstanding support and leadership to his or her state Young Agents program and/or YAC. State association staff, committee members, Young Agents, and other agency and/or carrier professionals are invited to submit a nomination. The award will be presented during the Awards Reception at the Young Agents Leadership Institute each fall.



**ACTIVITIES
HOSTED BY THE
NATIONAL YAC.**

LEGISLATIVE CONFERENCE.

CAPITOL HILL VISITS

Attendees get an exclusive look into how Congress works on issues that matter most to independent agents. Visits on Capitol Hill help participants understand the legislative process and how it impacts the industry. The [Big "I" Legislative Conference](#) occurs annually each spring.

NETWORKING OPPORTUNITIES

While at the conference, attendees will have the chance to connect with more than 700 insurance professionals from across the country. Exchange ideas, build relationships, and be part of the collective force driving industry growth.

SCHOLARSHIPS

First-time Young Agent attendees are highly encouraged to attend the Legislative Conference. It is a great opportunity to learn more about the industry and get involved politically.

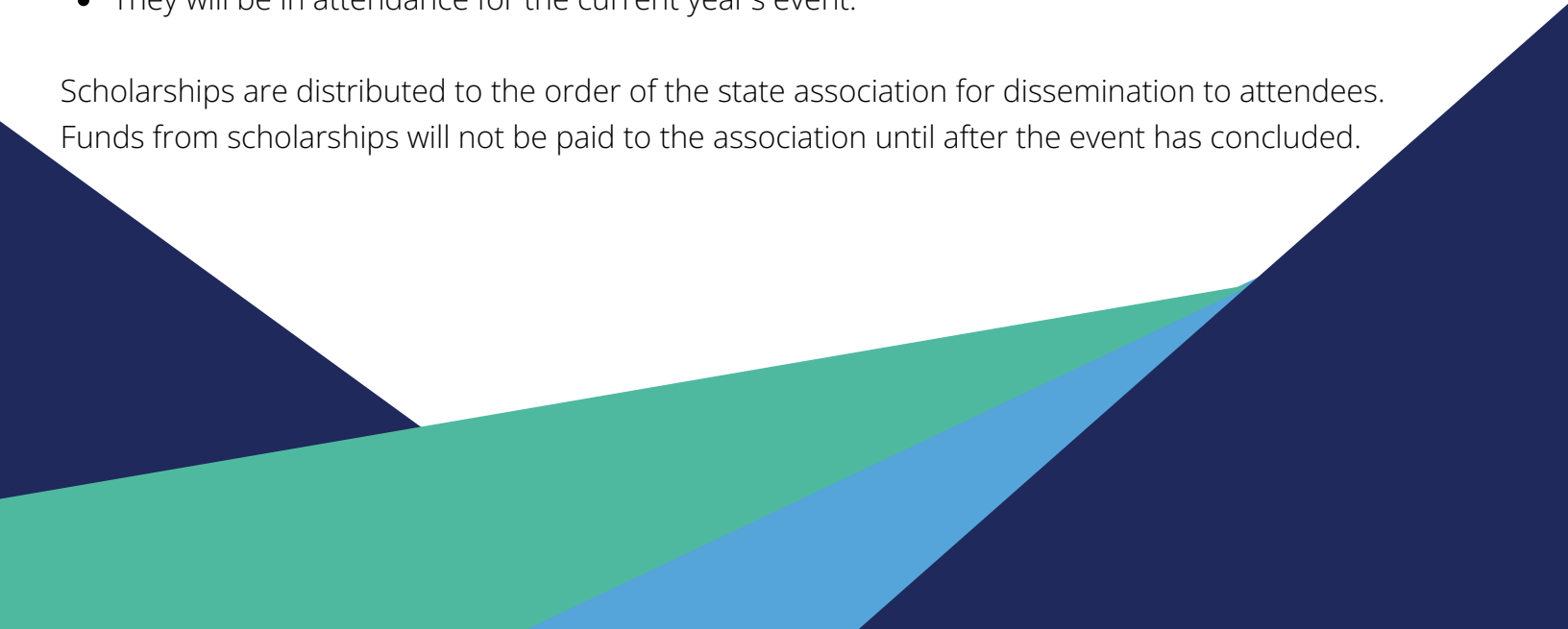
The National YAC offers **two (2) \$500 first timer scholarships** to each state association to send representatives to Legislative Conference.

Scholarship applications will open in February 2027. Only Young Agents (anyone 40 years or younger OR less than 5 years experience in the industry) who have never previously attended Legislative Conference are eligible for the scholarships.

In order to be eligible for a scholarship:

- The attendee has not previously been to a Legislative Conference (it is their first year ever in attendance).
- They fall in line with the definition of a Young Agent (under 40 years of age or less than 5 years experience in the industry).
- They will be in attendance for the current year's event.

Scholarships are distributed to the order of the state association for dissemination to attendees. Funds from scholarships will not be paid to the association until after the event has concluded.



YOUNG AGENTS LEADERSHIP INSTITUTE.

ONE-OF-A-KIND LEADERSHIP EXPERIENCE

Emerging professionals should prepare themselves for an awesome event. The [Young Agents Leadership Institute](#) (YALI) is an annual event that takes place in the fall. It attracts agents from across the nation and provides valuable leadership, sales, and technology expertise. It is also an incredible opportunity to network with other Young Agents, industry leaders, and carrier partners. This event is open to **any** Big "I" Young Agent!

Some of the main topics discussed are perpetuation, technology, sales and leadership, professional development, leadership strengths, and much more. Year after year, the feedback we receive is that the State Idea Share is the most valuable session. This is the time where states can openly discuss their successes, challenges, and questions as Young Agents programs from the past year.

Scholarships are available for first time attendees for YALI as well. Any first-timer can apply for a \$500 scholarship. There is no distribution of scholarships per state, but a limited number are available compared to Legislative Conference. The same eligibility rules apply for first-time attendees. Funds are distributed two weeks post-conference to the order of the state association for dissemination.

YALI PITCH PACK

Have a Young Agent who is interested in attending YALI, but not sure how to start the conversation with their agency principal ? We've made it easy.

Our YALI Pitch Pack is designed to help communicate the value of attending and demonstrate the return on investment for the agency. Whether they're preparing for the first conversation or making a formal business case, these resources showcase how YALI is an investment in both professional growth and the industry's future.

Click the links below to access the templates on Canva. You will need a Canva account (which is free to create) to personalize the content to help with the pitch!

[EMAIL TEMPLATE TO
AGENCY OWNER](#)

[YALI ONE-PAGER](#)

[LETTER TO AGENCY
OWNER](#)

[ROI WORKSHEET](#)

[WHY ATTEND YALI
PRESENTATION](#)

YOUNG AGENTS RESOURCE ROUNDTABLES.

These bi-monthly, virtual calls bring together Young Agents from across the country into conversations to support the development of their programs. Through this series, emerging leaders are able to hear from industry experts, network with their peers, share ideas, discuss challenges, and identify ways to support the growing industry.

This series was developed as a continuation of the State Idea Share at YALI. Instead of waiting for a one-time a year discussion, we wanted to encourage young agents, state liaisons, and other association staff to come together in between events and talk through ideas.

For the most updated schedule, visit the [Young Agents Resource Roundtable webpage](#).

EMERGING LEADERS MENTORSHIP PROGRAM.

This program was created to fill a need for one-on-one goal setting for future leaders. The program is designed to give mentors and mentees a framework for meetings and establishing measurable and meaningful goals.

Two states have implemented the program for their Young Agents: Arizona and Florida. The Big “I” has a series of emails/content that follows the guide that can be sent to mentors and mentees throughout the course of the program.

CORRESPONDING DOCUMENT

[Click here](#) to access the Emerging Leaders Mentorship Guide.



**INSURPAC
& GIVE.**

INSURPAC.

WHAT IS INSURPAC?

[InsurPac](#) raises and distributes approximately \$2.4 million each election cycle, making it one of the largest small business PACs in the country. It is funded by voluntary, personal, LLC, and Partnership contributions from independent agents, brokers, and agencies throughout the country. It works hand in hand with the Big I advocacy team to promote, protect, and perpetuate the independent agency system. Last year was a record setting year for InsurPac, as it raised nearly \$1.25 million. A total of 3,660 investors gave between \$5 and the maximum of \$5,000.

IDEAS TO FUNDRAISE

Have the Young Agents host a golf tournament or cornhole tournament where registration fees and funds raised can go toward the national InsurPAC or a state PAC.

Recognize Young Agents who have donated to InsurPac during your Young Agents Conference or State Convention. During the EPIC Conference, a Young Agents event hosted by the Alabama Independent Insurance Agents, their committee recognized Young Agent donors by:

- Inviting them to a thank you reception that occurred right before the conference kick off event.
- Presenting a thank you item of appreciation that could be worn throughout the event.
- Including an InsurPac recognition sticker on name badges.
- Recognizing donors during the closing reception speech.
- Ensure the InsurPac QR code is present at all Young Agent events so anyone is able to make a donation at any time.
- Host a 50/50 raffle during any networking events and happy hours hosted by Young Agents throughout the year. 50% of the proceeds go to the winner and the other 50% go to InsurPac!
- Plan a gala dinner. Invite community leaders, legislators, or political candidates from your state to attend and charge a per-plate fee for attendance. The fees collected from attendees can go toward a large donation to the PAC.
- Encourage recurring donations. The maximum a donor can contribute toward a PAC is \$5,000 per year. To maximize giving potential for any individual donor, invite recurring donations. These could be weekly, monthly or quarterly payments that are automatically deducted from the individuals account.

STATE SPOTLIGHT

The Big I South Carolina Young Agents raised \$37,654 in 2023. Their Young Agents and InsurPac Committee hosted fundraisers with prize drawings and announcements at all podium events. They led a silent auction and added in a bourbon package with their wine toss event!

STATE SPOTLIGHT

The Young Agents of Big I Oklahoma raised over \$1,800 for the Oklahoma-PAC at their annual Young Agents Conference in 2023. They hosted a speed networking event which required a \$20 donation at the door, exceeding their goal of \$1,300.

GIVE MOVEMENT.

BACKGROUND

The GIVE Movement was launched in 2018 by the Big I National Young Agents Committee (YAC). This week-long event highlights independent agents hometown acts of community service on a national platform. The Big I Young Agents are asking state associations, agents, and companies to give back to the community the week of June 1-10 and to share their activity by posting on social media using #TCAgentsGive. Anyone, anywhere can give back volunteer, host a fundraiser, be a collection site for a local charity this movement is all about small things that make a big difference.

DATES

Mark your calendar each year from June 1-10! This first week of June is the annual week for GIVE Movement activation.

STATE SPOTLIGHT

In 2026, the National YAC GIVE Week Sub-Committee partnered with the Big "I" Chairwoman, Angela Ripley, to raise awareness for The Ronald McDonald House and local foods banks. Multiple states got involved with activation for both organizations. For The Ronald McDonald House, individuals collected pop tabs to donate to their local chapters. Between Georgia, North Carolina, New York, and Maine over 40 pounds of pop tabs were collected!

CAMPAIGN MATERIALS

Checkout the [GIVE Movement](#) page for more information about the charity(ies) selected each year. This webpage includes information on who to get involved, ways to drive participation, a step-by-step guide for activation, content calendar, and editable social media graphics.

STATE SPOTLIGHT

The Young Agents from the Independent Insurance Agents of North Carolina hosted their 7th Annual Charity Golf Tournament to benefit two Make-A-Wish chapters in their state. Over the years, they have raised nearly \$300,000 for Make-A-Wish. In 2024, they were able to raise \$30,262.80 from their golf tournament. The event included 120 participating golfers, tee box sponsors hosted by company partners, and committee members serving as volunteers throughout the event.