

Programs & Perspectives: A National Overview

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Trusted Choice
INDEPENDENT INSURANCE AGENTS

The Big "I" Has Your Back

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Advocacy/Govt Affairs

- The industry's most powerful and respected advocate in federal government affairs
- Support for state government affairs in state capitals and representing independent agents with NAIC and NCOIL
- Advocacy with carriers, regulators, critical vendors, ISO, ACORD and others

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InsurPac

\$2.4 million each election cycle—one of the largest small business PACs and most recognized insurance PAC

More than 3500 individual investors in 2023

Record-breaking 40 individuals invested max. \$5000 last year

92% victory rate in last election

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InsurPac

Let's grow InsurPac!
If each agency gives \$100 = \$4 million
If each agency gives \$250 = \$10 million

Donate at insurpac.com with Big "i" login

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Invest

- Educational foundation fostering the next generation of industry talent
- Attracting people changing careers or just entering the workforce
- High school and community college curricula. Academic and licensing scholarships.
- New online learning portal launching soon
- investprogram.org

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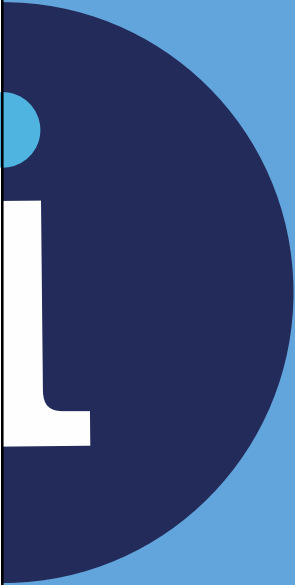
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Young Agents

- Networking and training opportunities
- YALI (Young Agents Leadership Institute) every fall
- NEW mentorship program with FREE downloadable guide
- Independentagent.com/young-agents

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Diversity

- Leading the way in diversity & inclusion with agents
- Inclusive Agency Training Series—4 online modules designed especially for independent agencies on developing D&I business strategies for competitive advantage
- Inclusion in Action quarterly e-newsletter. States opt in for members

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Big "I" Alliance

- **NEW!** Best-in-class market access for agency members
- Replaces and expands upon Big "I" Markets
- 3 tiers for participation with placements and appointments options

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ALLIANCE BLUE.

BLUE

Placement Center,
Formerly Big "I" Markets

LEARN MORE

- Placement center

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ALLIANCE BLUE PLUS.

BLUE PLUS

Vendor
Discounts

LEARN MORE

- Placement center
- Exclusive vendor discounts

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ALLIANCE GOLD.

GOLD

Strategic Carrier Alignment,
Contract Required

LEARN MORE

- Placement center
- Exclusive vendor discounts
- Strategic carrier alignments
- Contract required

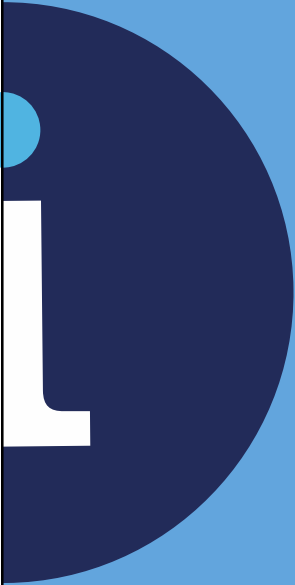
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Trusted Choice®

- Marketing-in-a-box resources
- **Hard Market Toolkit:** More than 10,000 downloads!
- New FREE customizable, ready-to-use co-branded digital content
- Expanded Marketing Reimbursement Program
- Free digital reviews for member agencies
- trustedchoice.independentagent.com

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INDEPENDENT INSURANCE AGENTS

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TrustedChoice.com

- Agent locator tool
- Advantage subscriptions for lead generation
- Heavy traffic—connecting agents to customers actively seeking insurance

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Big “I” Hires

- The industry-leading recruitment, retention and HR resource
- Delivered more than 90,000 new hires in member agencies since late 2018 launch
- NEW: Integrated nationwide job board at state associations’ request...and free state job board
- bigihires.com

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Best Practices Program

- Test. Measure. Manage.
- Real-life benchmarking and formulas for agencies of all sizes
- Annual study of Best Practices Agencies with Reagan Consulting. Learn from the nation's top performing agencies.
- independentagent.com/best-practices

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Virtual University

- The most-valued Big “I” resource for many agency principals, producers and CSRs
- Increased usage every year
- Ask-an-Expert: THE “go-to” for the toughest coverage questions
- Best-in-industry resource
- Very popular webinar series (CE credits for some!)

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E&O

- Your source for the best E&O available to independent agencies
- Partner: Swiss Re Corporate Solutions
- Manage E&O and cyber ops for 10 states
- Education. Claim prevention. News and trends.
- independentagent.com/eo

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ACT

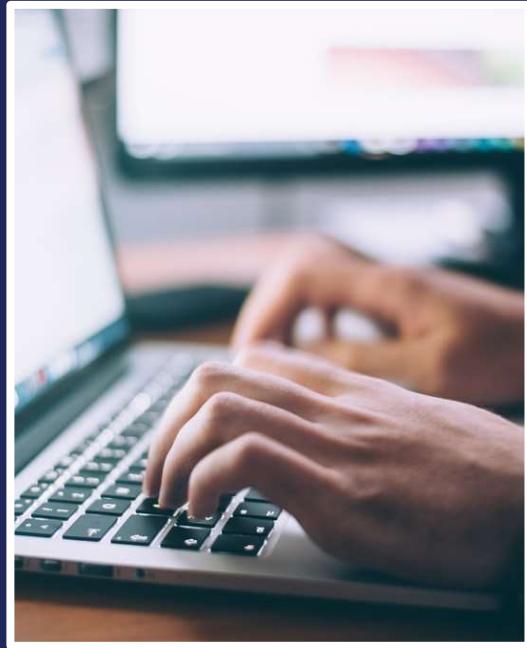
- Agents Council for Technology (ACT) keeps you updated on technology, digital, and cyber issues that impact agencies daily
- A treasure trove of FREE technology resources for Big "I" members
- Partners with InsurTech Task Force: InsurTech Summit
- independentagent.com/act

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ACT Technology Resources

- Cyber Guide 3.0
- Remote Work Security Guide
- Customer Experience Self-Assessment
- Disaster Planning Guide
- Agent's Resource Guide to Chatbots
- ADA & Accessibility Resource Page
- Agent-Customer Texting and eDelivery Agreements

PLUS: Countless on-demand webinars



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Communications

- Keeping you on top of industry and association news to help your agency thrive
- Award-winning monthly magazine, *Independent Agent*
- Weekly e-newsletters on markets trends, new products, industry headlines & association announcements
- Popular Agency Nation Radio podcasts
- iamagazine.com

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Independent Agent Magazine

Print Edition

- Big “I” flagship publication
- Gold standard in insurance industry news for agents
- Circulation: 38,000
- Winner of many business publication awards in last 3 years

NEW Digital Edition

- Easy to read
- Now mobile- and tablet-friendly
- New ad/sponsor opportunities
- Improved keyword search function



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Other Big “I” Benefits

- Legal, tech and financial help when and where agents need it most
- Company appointment contract reviews from the Big “I” in-house legal team
- Massive data and technology upgrade: New robust association management system (AMS) to be integrated with a new content management system (CMS) and website platform at national. Opportunities for state integrations/upgrades
- Trusted Choice® Relief Fund—assisting member agencies in their greatest time of need. \$150,000 given in grants to Hurricane Ian Victims
- InsurBanc created by and for independent agencies for range of financial needs

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