



2015 BIG "I"
**COMPANY
PARTNER**

Investment Opportunities



Independent Insurance Agents
& Brokers of America, Inc.

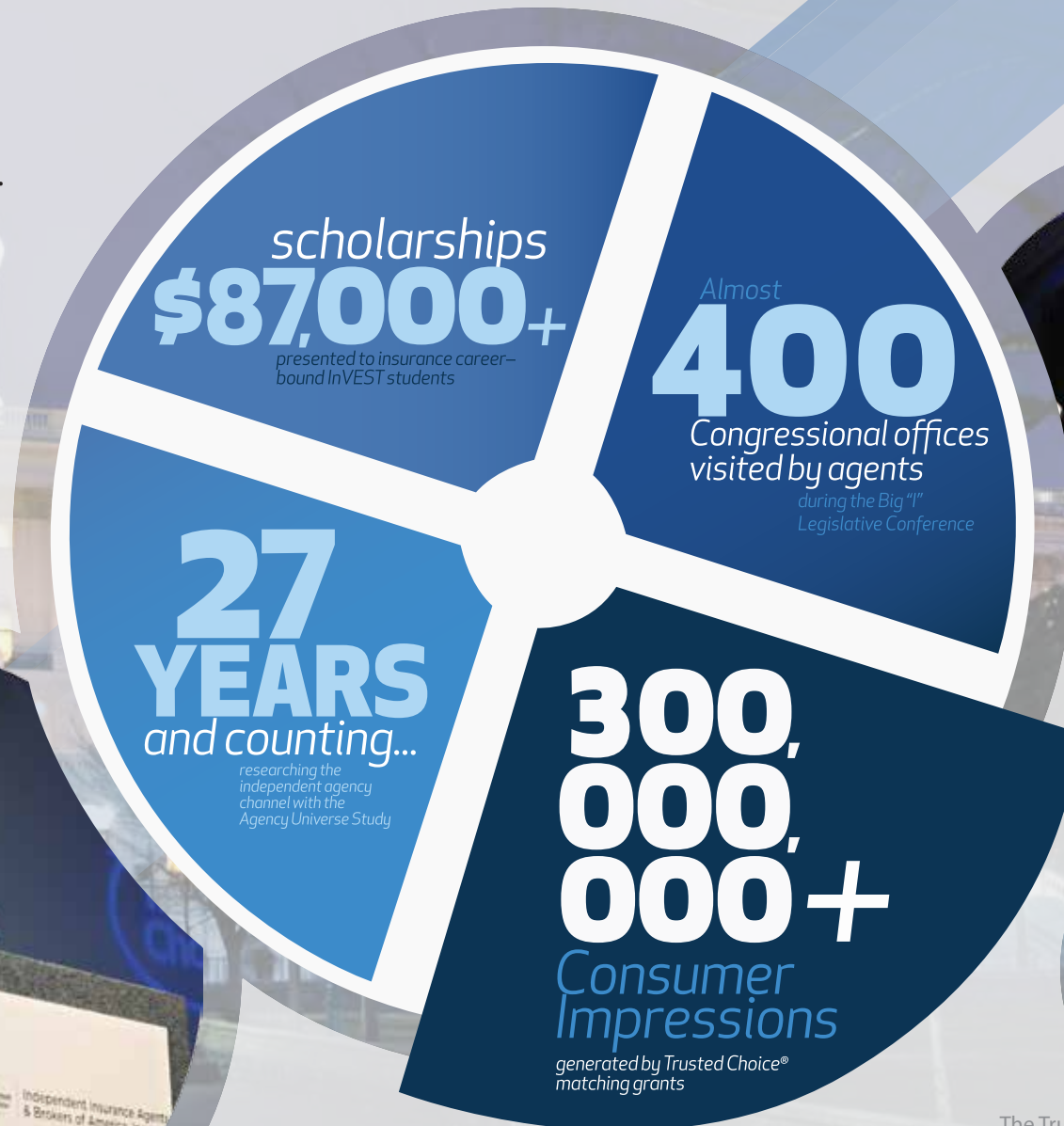
The Big "I": Giving Independent Agents a Competitive Advantage

Support the Independent Insurance & Brokers of America (Big "I") and reap the rewards of being part of the most powerful advocate for your distribution force.

For more than a century, the Big "I" has been the leader in providing independent insurance agents and brokers the resources, information, tools and protection they need to succeed.

Support the Big "I" and reach more than a quarter of a million agency professionals.

Big "I" President & CEO Bob Rusbuldt presents in Washington, D.C.



House Majority Leader Kevin McCarthy (R-Calif.) addresses Big "I" members at the 2014 Big "I" Legislative Conference.



Wish® kid Julia celebrates her wish.



The Trusted Choice® team hosts a Make-A-Wish® fundraiser.



(TrustedChoice.com)

- Educates consumers on the value of independent insurance agents

Only one brand unites more than 27,000 independent agency locations: Trusted Choice®. By supporting the national brand for independent agents, you will help your distribution channel grow market share. The new Trusted Choice Freedom Campaign, developed by advertising firm MARC USA, shows that agents are free to do what's right for their client, including offering choice in insurance carriers, customization of policies and advocacy. Key to the strength of the brand is the Pledge of Performance, which outlines a host of customer service benefits.

Through the combined efforts of company partners, local agencies and national, state and local Big "I" associations, Trusted Choice is reaching tens of millions of consumers, helping to give the independent agency channel the leverage it needs to compete in the

- Highlights choice, customization and advocacy
- Promotes the Freedom Campaign

insurance marketplace. To encourage agents to live the brand in their community, Trusted Choice helps defer the cost of printed collateral, web development, advertising and community sponsorship through its marketing reimbursement program.

Through a national partnership with Make-A-Wish®, Trusted Choice has contributed more than \$1,000,000 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 57,000 social media followers by creating round-the-clock 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.



(TrustedChoice.com)

- The digital marketing platform for your distribution channel
- Provides new sales opportunities for independent agencies

With TrustedChoice.com, independent agents can have the same technology advantage as the large direct writers and captive companies. By supporting Project CAP, your company helps your distribution channel continue to increase market share by leveraging digital marketing.

TrustedChoice.com is the online insurance resource center for consumers, helping them find information that will help them make an informed insurance purchasing decision and conveying the

- Offers insurance buyers accurate and useful insurance information and live quotes

value of the independent agent – choice, expertise and advocacy.

The portal provides features that make TrustedChoice.com a valuable resource for insurance shoppers, including a comparative rating engine that enables consumers to get a live quote from multiple insurance carriers after entering a single online application. Also included is the nation's largest directory of independent insurance agencies, with information on each agency's services and location.



(Independentagent.com/YoungAgents)

- Creates a network of future industry leaders
- Provides leadership skills

The national Young Agents Committee (YAC) provides young insurance professionals with educational and leadership opportunities to help them cultivate successful and rewarding insurance careers. These bright professionals chair state committees and influence thousands of principals, producers and CSRs.

Each year, the YAC hosts the Big "I" Young Agent Leadership Institute, which provides sales, leadership and agency best practices training to young agents around the country.

Young agents are also involved in the legislative process and

- Cultivates tomorrow's agency principals

work to protect the industry on Capitol Hill and in their states. In 2014, the Big "I" national YAC presented nearly \$20,000 in Big "I" Legislative Conference first-time young agent scholarships to help defer the cost of attending the event.

Sponsorship opportunities are available for the 2015 Big "I" Legislative Conference, which will be held April 22-26, 2015 in Washington, D.C., and the Big "I" Young Agents Leadership Institute, Oct. 2-3, 2015 in New Orleans. These events give company sponsors the priceless opportunity to showcase their brand and network with the industry's up and coming leaders.



(Independentagent.com/ACT)

- Offers a forum for companies, agencies, associations and technology providers to discuss industry challenges and opportunities

The Agents Council for Technology (ACT) enables companies, agents, technology vendors, user groups and industry associations to collaborate on how to effectively use technology to improve workflows, productivity, security and online marketing. By supporting ACT, companies help the independent agency system continue to be a thought leader in effective technology implementation.

ACT provides an opportunity for all stakeholders to brainstorm strategies that improve agent and carrier performance. Work groups and meetings give partners a way to discuss how to improve the industry's workflows, determine industry best practices, promote more effective agency online marketing and provide strategies to improve agency security. ACT's Strategic Future Issues and Agencies of the Future initiatives identify the key technology, consumer and business trends facing the industry and how agencies can embrace change. ACT also identifies "must

- Focuses on enhancing workflow, security and online marketing

do" issues and encourages the industry to rally around them to capitalize on the identified trends.

ACT hosts a variety of webinars to educate agents on key initiatives and also publishes regular articles for ACT members to distribute to the broader agency community. ACT and other industry partners continue to spearhead the Real Time/Download Campaign to increase agency and carrier Real Time and Download usage.

ACT hosts three in-person meetings per year, providing members with updates on initiatives, interactive discussions, presentations by thought-leaders and networking opportunities. Registration for ACT meetings is free for ACT members. Members also receive frequent reports and information to keep them up to date on agency, vendor and agent-carrier technology issues, as well as broad technology trends.



(InVESTprogram.org
LearnInsurance.org)

- Introduces students to careers in insurance

InVEST is the long-standing leader in workforce development in the insurance industry. For more than 40 years, InVEST has been educating students about insurance and promoting the variety of career opportunities the industry offers. This one-of-a-kind financial literacy program, offered in high schools and colleges across the country, creates an interactive classroom experience. Students learn the fundamentals of insurance and financial services through course materials, guest speakers and mock agency exercises, including the use of rating software.

Supporters and volunteers have access to program graduates to help fill internships and entry-level positions in their organizations. InVEST is committed to the future education of its graduates and in the spring

- Creates a talent pipeline for the future workforce of the independent agency system

of 2014 presented more than \$87,000 in scholarships to high school and college students pursuing insurance-related careers or degrees.

As of the close of the 2014 school year, InVEST has more than 500 programs and reaches more than 18,000 students—all potential insurance industry employees. Programs are active in 46 states and the District of Columbia.

As a 501(c)(3) educational trust, InVEST relies solely on tax-deductible contributions and this financial support determines the program's ability to grow. InVEST and companies share a common goal—to secure the future of the insurance industry. Your company's support is crucial to the success of InVEST.



(Independentagent.com/BestPractices)

- Provides agent-company forum to promote tools and programs to create profitable agencies

Independent insurance agents and brokers look to the Big “I” Council for Best Practices for ways to boost productivity, increase sales and improve agency operations. The Best Practices series of tools helps the independent agency distribution channel improve, grow, perpetuate and increase its value.

The Best Practices research is in the second year of the three-year cycle and Reagan Consulting continues to study the 218 firms that qualified as a 2013 Best Practices agency. Agencies are parsed into six revenue categories and analyzed based on financial and operational benchmarks. The Best Practices Study and subsequent annual updates reveal the secrets of the most successful agencies and brokerage firms in the country.

All Best Practices Study sponsors are invited to participate in the Best Practices Symposium which offers networking with the

- Empowers your agents with growth strategies

newest Best Practices agencies. The two-day event is held every three years and the next nomination cycle will begin in 2015 with the Symposium in 2017.

Study findings are the foundation for all of the Best Practices tools, including seminars, webinars, print and online resources. In addition to the annual study, in 2014 Best Practices released an updated customer service guide and perpetuation resource center.

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.



(Independentagent.com/Diversity)

- Attracts diverse professionals to insurance careers
- Educates agents on how to market to diverse consumers

Agents, brokers and carriers look to the Big “I” Diversity Task Force for resources to help understand and market to diverse communities. The Diversity Task Force engages and develops a sustainable diverse independent agency network by partnering with state associations, carriers, and industry affinity groups. It supports multicultural agent appointments under the premise that a more diverse insurance marketplace is a stronger marketplace.

To help the independent agency system embrace and prosper in emerging and diverse markets, the task force has created a series of online resources. The free web-based tools include an introduction with real-life agency case studies and a series of seven online

- Increases market share and diverse agency ownership

sessions with research to help the independent agency community better understand and market to individuals who comprise growing markets in the U.S.

The Diversity Task Force is driven by a focused team of agents and company executives who work together with multicultural industry groups, state associations and other Big “I” committees to create an awareness of the opportunities and benefits of embracing diversity.

The ultimate goal of the Task Force is to help create an independent agency population—from ownership to all staffing levels—that reflects the country’s diversity and enables both agencies and companies to achieve optimal growth and market penetration.



(Independentagent.com/AgencyUniverse)

- Shapes insurance laws and improves insurance regulation

For more than 25 years, Future One has brought the industry's top stakeholders together for two critical purposes: industry research and government affairs.

On the research side, Future One probes industry trends through the Agency Universe Study. This study is a comprehensive analysis conducted every two years that is the foremost authority on agency business issues. The Agency Universe Study also takes an in-depth look at technology,

- Conducts the most authoritative, in-depth research available on independent agents and brokers and the independent agency system

market share and the factors that drive consumer insurance decision-making.

Effective legislation and regulation comes from teamwork—a philosophy that is the basis of Future One's government affairs efforts. Future One is successful because it helps develop policy consensus on national and state issues, and works to secure legislation and regulations that are favorable for agents and companies.



BIG "I" LEGISLATIVE CONFERENCE

April 22-24, 2015 and April 13-15, 2016

(Independentagent.com/Events)

- Creates a unified voice for the independent agency system on Capitol Hill

The annual Big "I" Legislative Conference is the premier insurance industry event for agents, brokers, company executives and industry leaders held in Washington, D.C.

Attendees benefit from a power-packed program, including a legislative issues briefing and breakfast featuring prominent political speakers, a day to lobby on Capitol Hill and a general session on relevant industry topics. In 2014 the speaker line-up included, among others,

- Provides networking opportunities for companies, agents and other industry leaders

House Majority Leader Kevin McCarthy (R-Calif.), Rep. Steve Stivers (R-Ohio) and Democratic Congressional Campaign Committee (DCCC) Chairman Steve Israel (D-N.Y.). The program also included a spirited debate with political commentators Paul Begala and Tucker Carlson and a presentation by marketing expert Kelly McDonald.

Companies that sponsor this event benefit from extensive exposure to the industry's most influential independent agents and brokers.



(BigIGolf.com)

- Aug. 3-6, 2015, Prairie Dunes Country Club, Hutchinson, Kan.
- Aug. 1-4, 2016, Del Paso Country Club, Sacramento, Calif.

The Trusted Choice® Big "I" National Championship provides youth in the U.S. an opportunity to qualify and compete in a National Golf Championship. The annual Championship is modeled after professional tournaments. Since 1969, the Big "I" has hosted the tournament in more than 22 states.

Each summer more than 2,500 junior boys and girls 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 of the Trusted Choice Big "I" National Championship have gone on to become pros, so the event has garnered a strong media following. Previous tournament participants have included current PGA and LPGA players such as Tiger Woods, Phil Mickelson, Web Simpson, Charles Howell III, Jonathan Byrd, Chez Reeve, Will McKenzie, David Summerhays, Michele Wie, Beth Bauer and Shasta Averyhardt.

2015 BIG "I" COMPANY PARTNER *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+ Silver: \$2,500 — \$4,999
 Gold: \$5,000 — \$9,999 General: \$1,000 — \$2,499



Council for Best Practices

Annual investment opportunities vary by individual company involvement.



Diversity Task Force

Annual partnership: \$10,000



Agents Council for Technology

Annual partnership: \$10,000



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: \$24,000



2015 Big "I" Legislative Conference April 22-24, 2015 and April 13-15, 2016

Gold: \$20,000
 Silver: \$10,000 — \$19,999
 Bronze: \$3,000 — \$9,999

For more information, contact:

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Company partners stay in-the-know on industry trends and Big "I" programs by signing up for the quarterly e-newsletter for company partners, The Big "I" Insider.

