



2025 BIG 'I' COMPANY PARTNER INVESTMENT OPPORTUNITIES



Empowering Trusted Choice®
Independent Insurance Agents.



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.

1

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.

2

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.

3

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.

4

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.

5

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.



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.

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. Approximately 25,000 agency locations have joined their state’s association, which makes them national Big “I” members and Trusted Choice® agencies. The Big “I” has been proudly serving the independent agency community for more than 125 years.

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 benefits products.

OUR STRUCTURE.

The Big “I” is governed by a national board that is made up of an elected seven-person agent executive committee and has one volunteer agent chair and one volunteer agent director from each state association. The 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. When the market changes or technology evolves, we support agents with tools and resources to continue to thrive.

BRANDING & MARKETING.

- National consumer brand, Trusted Choice®
- Marketing, branding and content resources
- Education and training
- Hard market toolkit

TALENT PIPELINE.

- Leadership and sales skills for young agents
- Access to candidates and job posting tools
- Agency perpetuation and ownership resources
- Diversity, equity and inclusion training for insurance professionals

RESEARCH & 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

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



Unites independent agents
and brokers under one brand.

TRUSTEDCHOICE.INDEPENDENTAGENT.COM

TRUSTED CHOICE: EMPOWERING INDEPENDENT AGENTS TODAY & TOMORROW.

Only one brand unites approximately 25,000 independent agency locations: Trusted Choice.

Trusted Choice is dedicated to elevating the distinct benefits of independent agents through:

- **Marketing Support:** We serve as the fractional chief marketing officer for independent agents, offering expert assistance in areas typically outside the internal capabilities of most agencies. Our comprehensive support includes website analysis, customized marketing materials and tailored social media content.
- **Educational Resources and Training:** Agents have access to an array of marketing resources and training programs that help differentiate their services while leveraging the Trusted Choice brand, enhancing both their visibility and brand equity.
- **Amplifying Value:** We showcase the choice, customization and advocacy only independent agents can offer, ensuring clients receive personalized and effective solutions.

Supporting Trusted Choice means investing in a robust and prosperous future for the independent agency system.

TRUSTED CHOICE®.

ANNUAL PARTNERSHIP INVESTMENT

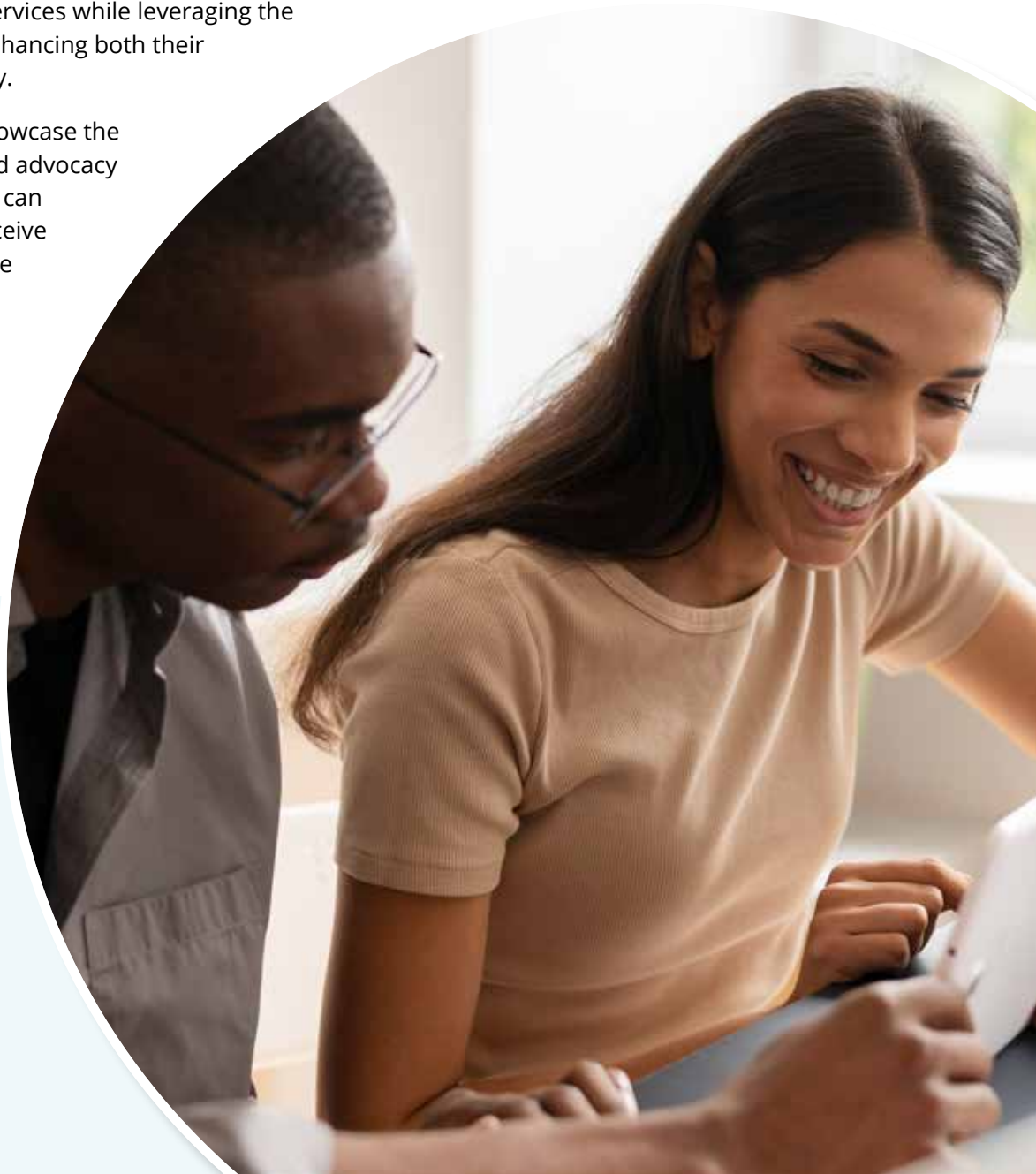
Annual participation based on every \$100 of property-casualty written premium

First year: 50¢

Second year (& beyond): 1¢

Minimum: \$5,000

Maximum: \$450,000





Position your company on the #1 independent insurance directory.

IACOMPANIES.TRUSTEDCHOICE.COM

- TrustedChoice.com appears in more than 20 million Google searches each month
- Generates over 1 million agency recommendations per year to inbound insurance shoppers
- Get boosted ranking and SEO advantages while getting recommended for the business you want to write

Over 500,000 consumers visit TrustedChoice.com each month to connect with an independent agent. As an Advantage company partner you can strengthen your brand, reach more agents and consumers, and drive more opportunities.



Make sure agents and consumers understand your brand and products. A profile on TrustedChoice.com showcases your brand featuring:

- Boosted ranking and SEO advantages
- Custom company description and territories
- Appetite specialization detail
- Products offered and locations serviced
- Agent resource center
- Testimonials
- Promotional video

Get recommended for the business you want to write. With a Level Two plan you get these opportunity-generating features:

- Get your brand and products recommended for the business you most want to write
- Drive more business to your best agents on multiple independent agent websites
- Share your appetite with agents
- SEO content targeted to your company appetite
- Receive immediate and monthly traffic and opportunity data

GIVE YOUR INSURANCE COMPANY
AN ADVANTAGE

To learn about partnering with TrustedChoice.com, contact Vinnie Savarese at:
vincent.savarese@trustedchoice.com

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. In 2025, an elite group of Best Practices agencies will be appointed through a nomination and data submission process. Council members may nominate agencies and are invited to education, events and networking opportunities. The comprehensive study analyzes agencies over a three-year period and the next study will be released in fall of 2025 with updates published annually. A Council for Best Practices meeting will take place in January 2025 in conjunction with the Big "I" Winter Meeting and during the Best Practices Symposium in 2026.

FUTURE ONE.



Lead industry research and government affairs.

[INDEPENDENTAGENT.COM/AGENCYUNIVERSE](https://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 — the Agency Universe Study
- Provides data analysis for company partners

ANNUAL PARTNERSHIP INVESTMENT

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: \$26,000

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.

ACT collaborates with industry-leading companies and organizations to:

- Facilitate discussions delivering relevant tools to enhance the industry's understanding and use of emerging technology
- Curate alignment in leveraging technology in the independent agency system
- Host webinars and digital content featuring ACT partners' expertise in technology-focused areas important to agents and brokers
- Engage in industry activities, such as speaking opportunities, partner meetings, user groups, collaboration with state associations and other Big "I" programs

ANNUAL PARTNERSHIP INVESTMENT

All pricing based on employee count

Carriers:	Technology Providers:
< 350: \$3,500	<35: \$3,500
350-700: \$6,500	35-70: \$6,500
>700: \$12,500	>70: \$12,500

Active Subsidiary Brands:
\$2,000 flat fee per brand
(Fees capped at 3rd subsidiary)

For more than 25 years, the Agents Council for Technology (ACT) has been at the forefront of industry technology conversations. Our neutral forum, comprised of carriers, technology companies, and passionate member agents and brokers, is dedicated to helping independent agencies embrace technology as a strategic tool for success.

Looking ahead, ACT is committed to expanding its role as a technology advocate for the independent agency channel. With your support, we will deepen our collaboration with partners and Big "I" members to identify and address key technology challenges and opportunities.

In the immediate future, ACT will cultivate resources and relationships around data, connectivity, artificial intelligence, people and culture.

We are in a time of unprecedented change, and technology will be the cornerstone of how independent agencies evolve and thrive. ACT is excited about the future and is committed to playing an even more significant role in helping the industry at large understand and leverage technology effectively for years to come. Your support is crucial to our mission. Together, we can make a lasting impact on our industry.



**ATTRACT
& DEVELOP**

THE BEST
TALENT
FOR YOUR
DISTRIBUTION
FORCE

- 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 online resources including educational materials, marketing plans, webinars and best practices on a wide variety of DE&I topics

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.

Current initiatives include the four-module virtual Inclusive Agency Training Series, Right Start Training Series and Agency Owner mentorship program and a new partnership with Hiring Our Heroes. Stay up to date via the quarterly Inclusion in Action e-newsletter and association-wide content collaboration.

ANNUAL PARTNERSHIP INVESTMENT

Carrier Partner: \$12,000

Carrier Subsidiary Brand: \$2,500

Brokerage: \$5,000

**INVEST
PROGRAM.**



Attract top talent to the independent agency channel.

INVESTPROGRAM.ORG

- Provides free insurance education resources to teachers and volunteers
- 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, community college and licensing courses

Invest is pleased to continue its mission to provide insurance, financial literacy and risk management education. Thanks to the support of carriers, vendors and the independent agency distribution channel, Invest has introduced more than 33,000 students to the business of insurance. The program has expanded its reach even further by partnering with DECA, a national education association that works with over 200,000 high school students each year. With a particular focus on independent insurance agency careers, Invest continues to showcase the array of rewarding careers in the industry by collaborating with workforce development programs and community colleges. Support Invest, a 501(c)(3) educational foundation, and help cultivate a stronger workforce and create more informed insurance consumers.

ANNUAL PARTNERSHIP INVESTMENT

Valedictorian: \$20,000

Salutatorian: \$10,000

Honor Roll: \$5,000

- 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

Bronze: \$2,500

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.

SAVE THE DATES!

2025 Big "I" Legislative Conference

April 30–May 2 | Washington, D.C.

2025 Big "I" Young Agents Leadership Institute

Sept. 11–13 | Nashville, Tennessee



BIG "I" LEGISLATIVE CONFERENCE

Network with industry leaders poised to protect the insurance marketplace.

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 approximately 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 extensive exposure to the industry's most influential independent agents and brokers.

2025 BIG "I" LEGISLATIVE CONFERENCE



2025 Big "I" Legislative Conference
April 30-May 2, 2025



Washington, D.C.

SAVE THE DATE FOR 2026!



2026 Big "I" Legislative Conference
April 22-24, 2026



Washington, D.C.

2025 BIG "I" COMPANY PARTNER ANNUAL INVESTMENT OPPORTUNITIES

<p>TRUSTED CHOICE®.</p> <p>For every \$100 of property-casualty written premium</p>	<p>First year: 50¢ Second year (& beyond): 1¢ Minimum: \$5,000 Maximum: \$450,000</p>		
<p>YOUNG AGENTS.</p>	<p>Platinum: \$12,500 Gold: \$7,500 Silver: \$5,000 Bronze: \$2,500</p>		
<p>COUNCIL FOR BEST PRACTICES.</p>	<p>Annual investment opportunities vary by individual company involvement</p>		
<p>DIVERSITY COUNCIL.</p>	<p>Carrier Partner: \$12,000 Carrier Subsidiary Brand: \$2,500 Brokerage: \$5,000</p>		
<p>AGENTS COUNCIL FOR TECHNOLOGY.</p> <p>All pricing based on employee count</p> <p>Active Subsidiary Brands \$2,000 flat fee per brand (Fees capped at 3rd subsidiary)</p>	<table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <p>Carriers:</p> <p>< 350: \$3,500 350-700: \$6,500 >700: \$12,500</p> </td> <td style="width: 50%; vertical-align: top;"> <p>Technology Providers:</p> <p><35: \$3,500 35-70: \$6,500 >70: \$12,500</p> </td> </tr> </table>	<p>Carriers:</p> <p>< 350: \$3,500 350-700: \$6,500 >700: \$12,500</p>	<p>Technology Providers:</p> <p><35: \$3,500 35-70: \$6,500 >70: \$12,500</p>
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<p>INVEST.</p>	<p>Valedictorian: \$20,000 Salutatorian: \$10,000 Honor Roll: \$5,000</p>		
<p>FUTURE ONE.</p> <p>Annual participation based on written premium</p>	<p>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: \$26,000</p>		
<p>BIG "I" LEGISLATIVE CONFERENCE.</p>	<p>Platinum: \$50,000+ Gold: \$20,000-\$49,999 Silver: \$10,000-\$19,999 Bronze: \$5,000-\$9,999</p>		

Beth Montgomery
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**SECURE YOUR
INVESTMENT
TODAY.**



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