



Big "I" Member Benefits

Plug into programs designed to power your agency, available exclusively to Big "I" members.



iiabw

Independent Insurance Agents
& Brokers of Washington



Welcome to IIABW!

IIABW offers a wide range of programs, products and services which are of genuine value to our members and we hope you will take full advantage of those which can help you and your business. We also hope that you will take an active part in your association's events such as the annual conference, legislative conference and the numerous education programs offered throughout the year. Please visit our website at www.wainsurance.org for our calendar of education offerings and events as well as the latest on IIABW's products and services.

As an IIABW member, you are also a member of the Independent Insurance Agents & Brokers of America (www.independentagent.com), the nation's largest insurance producer association. In addition to the various products and services offered, you will be represented in Congress by IIABA's government affairs staff just as you are here at home by our lobbyist in Olympia.

It is a privilege and a pleasure to have you as a member of the association. We encourage you to get the most from your membership. Please call us at any time if we can be of service to you.

Sincerely,

Daniel Holst
Executive Vice President

Big "I" Benefits Highlighted in this Brochure

Trusted Choice®

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Big I Advantage®

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Trusted Choice® Member Resources

FREE for all Big “I” members!

BIG i®



Trusted Choice is designed to amplify your local marketing efforts and highlight the value independent insurance agents bring to consumers.

How Trusted Choice Helps You:

Enhance Your Online Presence

- **Free Analysis of Your Agency Website** – learn how to improve your SEO and user experience with a Digital Review – one of our most popular programs!
- **Upgrade Your Social Media** – Access a full library of ready to use social graphics, videos and articles targeted at consumers. Be sure to check out our monthly planning calendar!

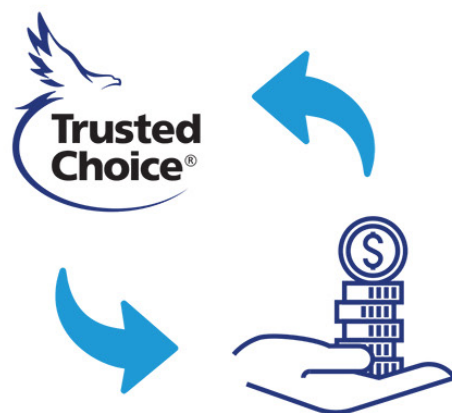
NEW!

→ **Automate your social posts** – Through our partnership with Social Jazz your agency can schedule 12 months of posts in just a few minutes.



Marketing Reimbursement Program(MRP) & Vendor Support

- **Access MRP funds** to help offset the cost of marketing your agency when including the Trusted Choice logo or when working with a preferred MRP vendor on the TechCompare website. *Get up to \$1000 back reimbursed at 50%.*
- **Browse the TechCompare platform** to connect with reputable vendors offering a range of services including digital marketing, SEO, automation and more. www.techcompare.independentagent.com



Leverage a Nationally Recognized Brand Name

- **Request free marketing materials** for your agency customized with your logo and info.
 - Print and Digital ads, Video, Direct Mailers and more
- **Showcase that you are a Trusted Choice Independent Agent** and feature the Trusted Choice logo on your website and office signage, in ads or giveaway items created by you!



Training Programs

- **Social Media** – Pick from three difficulty levels ranging from profile basics, to learning how to use for a business up to advanced tactics like post boosting and more.
- **Advertising 101** – This online training offers step-by-step strategies to create the right message, form a plan and create the perfect pitch.
- **Power of 30 Seconds** – A training designed to help maximize customer experience when contacting your agency by phone.



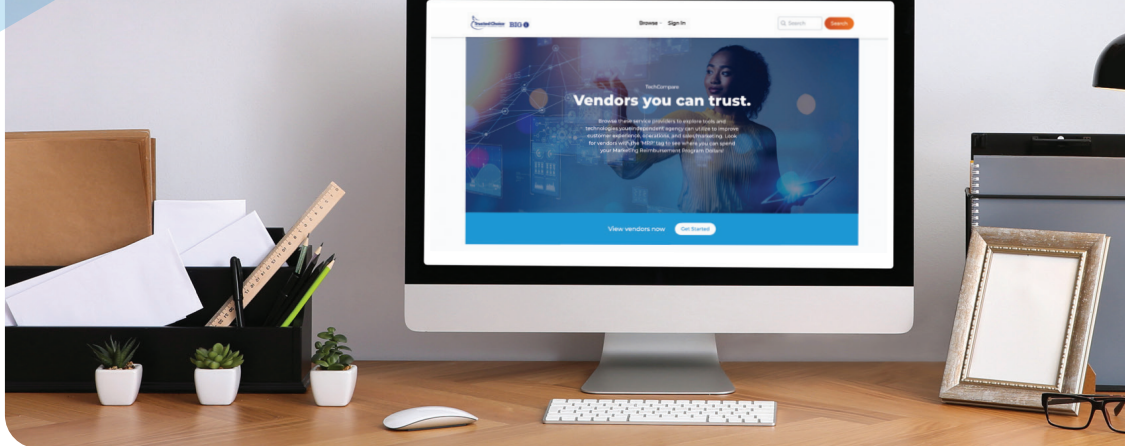
Access the Hard Market Toolkit

Expert Advice | Client Talking Points | Email Templates | Renewals Forms | And more!

For information on all benefits,
visit our member resource site at:
www.trustedchoice.independentagent.com



BIG



Find Your Perfect Technology Provider with **TechCompare**

Streamline Your Search, **Connect with Reputable Vendors**



*Logos represent TechCompare vendors as of May 2023 and actual vendors may vary

If you're looking for a technology provider that understands the unique needs of Independent Agents, look no further than TechCompare. Our platform simplifies your search and connects you with a range of industry leading service providers who specialize in everything your agency needs to modernize and grow.

Look for vendors with the **MRP tag** to see where **Trusted Choice®** can help you save

Find solutions for: SEO, Digital Marketing, Automation, LeadGeneration, and much more!

Visit **TechCompare.IndependentAgent.com** today!

Trusted Choice® MARKETING REIMBURSEMENT PROGRAM **2024**

All Big "I" members can access **up to \$1,000** in funds to offset the cost of marketing and customer experience improvement expenses.



Co-brand with the Trusted Choice logo

Add the Trusted Choice logo to any consumer facing ads or marketing to be eligible.

Members can choose from traditional options like billboards and print ads or from digital options like social media and streaming service ads.



TechCompare Vendors

Members can choose to use funds towards marketing or customer experience improvements with any of Trusted Choice's Preferred Vendors that are listed on the TechCompare site and labeled MRP eligible.

Services include SEO, Websites, Automation, Digital Advertising and more.

All members have access to up to \$1,000. Reimbursements are made at 50% of final cost. Members can utilize funds in one or multiple transactions. Members can only be reimbursed a maximum of \$500 for any one TechCompare vendor. Program is first come, first served until funds have been depleted.

For full program details or to submit a reimbursement request visit trustedchoice.independentagent.com/MRP today!

How to Register for Big "I" Alliance Blue

Go to the [Alliance Blue registration page](#). Be sure to pull the items listed to get started. Enter your email address and password and click on the green 'BEGIN REGISTRATION' tab. Follow the seven steps to complete the agency registration:

1. Verify/enter agency information, which is pre-populated from our member database. Click 'Update'.
2. Verify/enter agency tax, banking, and license information. Click 'Next'.
3. Verify/enter agency E&O information. Click 'Update'.
4. Verify the background information questions, then click 'Update'.
5. Verify/enter user information. Agency staff listed in our database are shown here. For someone to be able to submit business, their license information must be recorded. Click on 'Enter License Info' next to his or her name and enter their individual license information. Click 'Add User' to include names not already listed. Select 'Next' once completed.
6. Verify/update whether you would like to participate in Big "I" Flood, offered through Selective. Answering "No" to either question will not prevent you from using the Big "I" Flood program in the future. Click 'Next'.
7. Read then e-sign the Agency Sub-producer Agreement by entering your initials in the box at the bottom and clicking 'Accept' to update the information. You are encouraged to print the agreement for your records.

You can now log in to Big "I" Alliance Blue to view products. Within 24 hours, an Alliance Blue team member will review your registration and contact you to confirm your registration has been activated or request more information. If you need immediate access, email us at allianceblue@iiba.net.

How to Update Your Agency Information

Now that you are registered, follow instructions below to make a variety of changes. Note that updates can only be made by the agency's designated System Administrator. System administrators can access all submissions, commission statements and agency details. An agency can assign one or more persons to this role by checking the 'Big "I" Markets Permission' box on the individual's 'Enter License Info' tab in step five of the registration process.

How to Pull Commission Statements

1. Login into [Big "I" Alliance Blue](#).
2. Select 'Agency Profile' located in the left-hand column.
3. After the agency page has loaded, select 'Commission Statements'.
4. Select the 'Download Statement' icon to download the statement.

How to Update the Commission Statement Notification Recipient

When a commission payment is made, the system sends notification to pull the commensurate statement from the portal. Follow the steps below to assign or reassign the recipient email address.

1. Go to [Big "I" Alliance Blue](#) and select the green 'BEGIN REGISTRATION' button.
2. Click 'Next' and proceed to Step #2.
3. Within the 'EFT Information' section, update the 'Commission Statement Email' box.
4. Once completed, click 'Next' then close the window; you do not need to finish the remaining steps.

How to Add New Users

1. Go to [Big "I" Alliance Blue](#) then click the green 'BEGIN REGISTRATION' button. Continue clicking on 'Next' or 'Update' until you reach Step five.
2. Click on 'Add User' on the bottom right and enter the information. Be sure to also enter the individual's license number. Click 'Next'.
3. Once additions have been made, close the window; you do not need to finish the remaining steps.

How to Add a New Agency Non-residence License Number

1. Go to [Big "I" Alliance Blue](#) then click the green 'BEGIN REGISTRATION' button.
2. Continue clicking on 'Next' or 'Update' until you reach Step Two.
3. Look for the 'Agency License' section and update or add information.
4. Once additions have been made, close the window; you do not need to finish the remaining steps.

Questions?

Contact us at allianceblue@iiba.net or (703) 647-7800.





Introducing your Big “I” Agency Alliance.

Powerful market access. Deep vendor discounts. An alliance aggregation opportunity.

BIG i[®]
ALLIANCE BLUE.

- ⚙️ Market access placement center
(Formerly Big “I” Markets)

BIG i[®]
ALLIANCE BLUE PLUS.

- + Market access placement center
- + Exclusive vendor discounts

BIG i[®]
ALLIANCE GOLD.

- ☀️ Registered for Placement Center
- ☀️ Exclusive vendor discounts
- ☀️ Strategic carrier alignments
- ☀️ Contract required

Learn more and join us!

BIGIMEMBERALLIANCE.COM



ALLIANCE BLUE.

WHAT IS BIG "I" ALLIANCE BLUE?

Formerly known as Big "I" Markets, Big "I" Alliance Blue is IIABA's FREE online market access placement center program. We provide Big "I" members with access to specialty/niche coverages, program business and hard-to-find markets. Our top tier carrier partners offer access to the products you need, with new carriers being added in response to member needs.

PERSONAL LINES

Affluent Markets
Auto and Home Standard Markets
Flood
Jewelry
Non-standard Homeowner
Umbrella & Home Business

COMMERCIAL LINES

Bonds
Cyber
Commercial Auto
Community Banks
Executive Risks
Habitational
Real Estate Agents/Property Manager E&O
Small Commercial

Product availability varies by state.

WHAT SETS US APART?

After completing our online registration, you can begin submitting business online. Simply answer a few questions and provide banking info, licensing info, tell us about your E&O insurance, and accept the sub-producer agreement. Approval takes about one business day, then you're off and running and can begin submitting and doing business online 24/7.

PROGRAM FEATURES

- No initial access fees
- No ongoing monthly fees
- No termination fees
- No monthly minimum production requirements
- No obligation to submit other accounts
- Ownership of expirations
- EFT commission payments

You can access the markets you need once a year or multiple times per day; the price to access products through Big "I" Alliance Blue remains the same: zero. Log in and plug in to the power!

QUESTIONS? Contact allianceblue@iiaba.net or visit www.independentagent.com/Alliance.



ALLIANCE BLUE.



Washington Product Availability as of 6/24

PERSONAL LINES

Affluent Program

- Chubb
- AIG

Auto & Home Standard Markets

- Branch
- Foremost
- Progressive
- Safeco

Non-Standard Markets

- Lloyd's Coverholder

Selective Flood

Home Business Insurance

Jewelry Insurance

- Jewelers Mutual

Personal Umbrella

- RLI

Umbrella Alternative Market

- Anderson & Murison

Recreational Marine

Recreational Vehicle

LIFE AND HEALTH

Crump Life Insurance Services

COMMERCIAL LINES

Bonds

- Goldleaf
- Propeller

Commercial Auto Monoline

- Forge Insurance Inc.
- Progressive
- Travelers

Community Banks Business Insurance Program

Cyber Insurance – Coalition

Executive Risks – Coalition

Deductible Buy Back

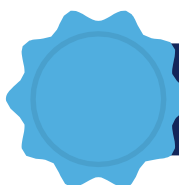
Real Estate Agents / Property Manager E&O

Flood - Selective WYO

Small Commercial

- Berkley Aspire
- Chubb
- CNA
- Pie Insurance
- Travelers Select

No fees, no volume commitments, and you own your expirations!



BIGIMEMBERALLIANCE.COM

IS YOUR AGENCY READY TO JOIN AN ALLIANCE?



Big "I" Alliance was created to assist independent agents gain market access through membership. Our objective is to aggregate premium, identify opportunities for growth, promote profitability, and provide broad communication and training to agency members on behalf of our carrier partners.

Big "I" Alliance Gold benefits include:

- ▶ **DIRECT ACCESS TO CARRIER SYSTEMS AND UNDERWRITERS**
- ▶ **PROFIT SHARING AND INCENTIVE ELIGIBILITY**
- ▶ **OWNERSHIP OF EXPIRATIONS AND CARRIER CODES**
- ▶ **NATIONAL AND REGIONAL CARRIER PARTNERSHIPS**
- ▶ **OPTIONAL PARTICIPATION IN A MASTER AGENCY E&O PROGRAM**
- ▶ **VENDOR PARTNERSHIPS**



100% COMMISSION



PROFIT BONUSES



\$2500 START-UP FEE



\$250/MONTH



YOU OWN THE BOOK



ALLIANCE GOLD.

Washington Product Availability as of 6/17/24



PERSONAL LINES

- Acuity
- Bristol West
- Foremost Choice
- Foremost Signature Agent 360
- Foremost Signature ARS
- Jewelers Mutual
- Nationwide
- Safeco
- Steadily
- Travelers

COMMERCIAL LINES

- Berkley Management
- Cowbell
- Hanover
- Jewelers Mutual
- Liberty Mutual
- Nationwide
- Propeller Bonds
- Travelers Commercial Select
- US Assure

LIFE AND HEALTH

- Crump Life Insurance Services



BIGIMEMBERALLIANCE.COM



Help your small and mid-size business clients become less vulnerable to cyber attacks.

Offer a cyber quote from Coalition through Big “I” Alliance Blue.

Big “I” Alliance Blue has partnered with Coalition to bring a cyber market to Big “I” members that goes above and beyond a standard BOP endorsement. Coalition’s proactive approach to cyber risk, along with their security and risk management apps, can reduce policy-holder costs’ to detect, recover, and contain a breach by over 40%.

Coalition believes that prevention is an essential component of protection and offers all policyholders a suite of security tools providing monitoring and protection **at no additional cost**, including:

Credential Monitoring – Coalition alerts the policyholder when an employee’s password or identifying information is stolen and may be used by a hacker.

Threat Monitor – Coalition’s passive monitoring picks up signs of phishing activity, anomalous network and DNS activity, domain monitoring, and other indicators of breach, as well as practical advice for how the policy-holder can protect their business.

Ransomware Prevention – Anti-ransomware software can be downloaded to all of the policyholder’s computers.

Patch Manager - Coalition passively scans the policyholder’s Internet-facing infrastructure & sends alerts of out-of-date software and vulnerabilities.

DDoS Mitigation - Coalition’s provided denial of service (DDoS) mitigation service is always-on, and can easily be setup in under 4 minutes. This service includes over 15 Tbps (terabits p/second) of available network capacity, over 300x the capacity of the average large DDoS attack.

HackerOne Response - Put the good guys on the attack. Policyholders can enlist ethical hackers to help find vulnerabilities.

Security Awareness Training - Free to first 15 employees. From falling for phishing attacks to accidentally downloading malware, human error is most often the root cause of data breaches. program publicly listed in the HackerOne directory.



BIGMEMBERALLIANCE.COM/BLUE

NON-STANDARD HOMEOWNERS MARKET FROM LLOYD'S

LLOYD'S Coverholder

Big "I" Alliance Blue is an approved Lloyd's coverholder giving its members access to non-standard homeowners with Lloyd's. It's available in all states except CA and HI.

WHY LLOYD'S?

Lloyd's is the world's leading insurance and reinsurance marketplace. Through the collective intelligence and risk-sharing expertise of the market's underwriters and brokers, Lloyd's helps to create a braver world.

The Lloyd's market does this by sharpening the insight to anticipate and understand risk, and the knowledge to develop relevant and innovative forms of insurance for customers globally.

Lloyd's offers the efficiencies of shared resources in a marketplace that covers risks from more than 200 territories, in any industry, at any scale.

Lloyd's promises a trusted partnership – helping people, businesses, and communities to recover in times of need and build resilience for the future.

WHAT PROPERTIES ARE THE BEST FIT?

- Builder's Risk (renovations/repairs)
- Catastrophe prone areas
- Corporation/LLC, Estate, and Trust Titled
- Course of Construction (ground-up)
- EIFS Construction
- Lapsed Coverage
- Log Home Construction
- Adverse Loss History
- Mono-line/Unsupported Risks
- Multi-family Occupancy
- National Historical Register Properties
- Older Homes
- Piers/Stilts/Pilings Foundation
- Rental Dwellings
- Seasonal/Short-term Rentals
- Supplemental Heating
- Protection Class 9 or 10 Risks
- Vacant Properties

Questions? Log into Big "I" Alliance Blue or contact our Big 'I' Advantage Surplus Lines Underwriting Manager at stacey.frazier@iiaba.net.

BIGIMEMBERALLIANCE.COM/BLUE

"For more than three centuries, the Lloyd's market has been sharing risk to protect people and businesses, inspiring them to create a braver world."

-John Neal, CEO, Lloyd's

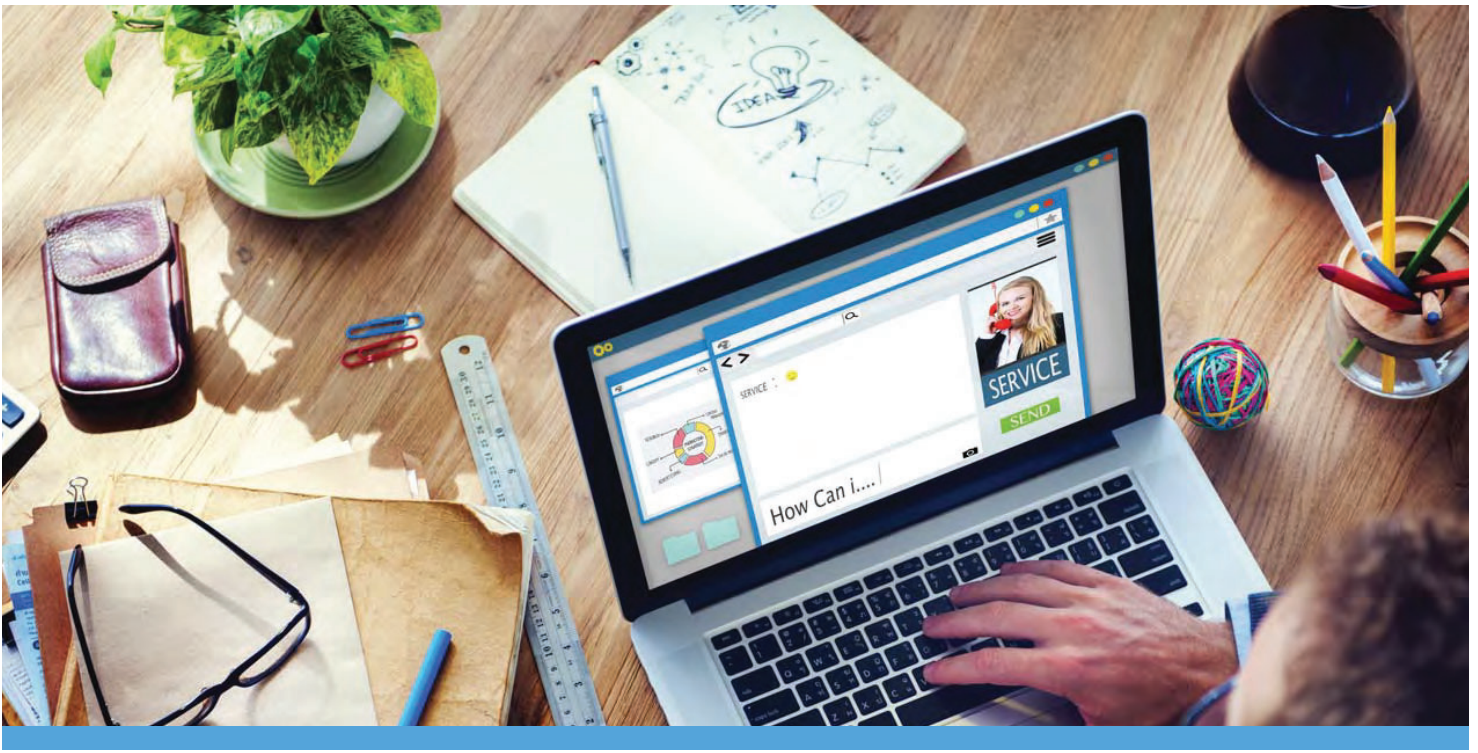
PRODUCT FEATURES

- HO-6 premiums starting at \$500
- HO-3, HO-5 & DP-3 premiums starting at \$1,000
- HO-3, HO-5 & HO-6 Coverage A \$150,000 to \$750,000
- DP-3 Coverage A \$150,000 to \$500,000
- Additional Living Expense/Fair Rental Value
- Broad/Limited Theft coverage
- Identity Fraud coverage
- Loss Assessment coverage
- Ordinance or Law coverage
- Personal and Medical Payments Liability coverage
- Refrigerated Property coverage
- Replacement Cost coverage
- Scheduled Personal Property coverage (up to \$25,000 per class with Agreed Value)
- Water Back-up/Limited Fungi coverage
- Wind/Hail coverage (eligibility varies by state)*

*Wind/Hail coverage is excluded in the following areas:

- Entire states of FL, KS, NE, OK, SD and TX
 - First and second tier counties from LA to NC
 - First tier counties VA to ME
- First tier counties touch coastal waters
Second tier counties touch first tier counties*

BIG 
ALLIANCE BLUE.



BIG SM i

HOME BUSINESS.

RLI's Home Business Policy provides affordable coverage for those people who operate small home-based businesses.

A typical homeowners policy doesn't provide adequate coverage for a home business. For example, coverage is usually excluded by a HO policy in these situations:

- **Business equipment is stolen from a vehicle**
- **Groceries spill onto inventory in the trunk of a car**
- **A power surge damages a computer and scanner**
- **Someone steals a cash box**

The RLI Home Business Policy features:

- No minimum volume requirements or access fees
- Easy underwriting
- Self-rating application
- Direct bill at new business and renewal via credit card and ACH
- Availability regardless of the carrier providing the home owners or apartment-dwellers coverage
- Competitive rates starting at just \$125 annually, depending on the location and type of business

**Contact Ridge Ostling at
rli@wainsurance.org or 425.336.0847
to learn more.**

HOLD ON TO YOUR CLIENTS



RETAIN CLIENTS BY CROSS-SELLING PERSONAL UMBRELLA

Clients who have multiple policies with your agency are less likely to move their business elsewhere. Offering every client a personal umbrella is an easy way to protect your agency's book of business, boost sales, and protect the clients who trust you.

The RLI Personal Umbrella features:

- ▶ Limits up to \$5M available (\$1M in NM)
- ▶ Keep the current home/auto carrier
- ▶ No age limit on drivers
- ▶ Up to one DWI/DUI per household allowed
- ▶ Simple, self-underwriting application
- ▶ E-signature and credit card payment options
- ▶ Immediate coverage available in all 50 states and D.C.

BIG *i*[®]
PERSONAL UMBRELLA.

RLI[®]
PERSONAL UMBRELLA POLICY

Contact: Ridge Ostling, rli@wainsurance.org 425.336.0847

INSURANCE AGENTS ERRORS AND OMISSIONS COVERAGE THAT'S **RIGHT FOR YOUR BUSINESS**

Why Choose Big "I" Professional Liability and Swiss Re Corporate Solutions?

PROMPT, LOCAL SERVICE –

Superior customer service and expertise by your Big "I" state association, who serves as your agent with underwriting authority offering prompt turnaround of quotes and policy delivery.

MORE PREMIUM DISCOUNTS –

Qualifying agents can save over 50% in premium discounts including risk management, claims free, agency operations improvement review, efficiency, and carrier concentration credits.

DEDUCTIBLE SAVINGS –

Loss only deductible available along with deductible reduction feature offering up to 100% savings of deductible (up to \$25,000) per claim.

EASE OF BUSINESS –

Our qualifying policyholders enjoy the benefit of automatic renewal available with no applications along with online applications when required.

CLAIMS HANDLING – Prompt and thorough claims handling by an experienced staff made up primarily of licensed attorneys who stand ready to support policyholders with any potential incident or claim.

FLEXIBLE UNDERWRITING – Targeting agencies of all sizes and unique operations including both P&C and L&H-only agencies.

CAPACITY – Limits up to \$30M

RISK MANAGEMENT TOOLS – Policyholders have FREE access to the exclusive website E&O Guardian (eoguardian.com) and the E&O Claims Advisor Newsletter.

STABILITY – Nationally endorsed program with over 30 years experience and the largest and most stable independent insurance agency E&O program in the country, rated A+ (Superior) by AM Best.

EXCLUSIVE – A Big "I" member exclusive policy form and premium credits filed on a Risk Purchasing Group basis give Big "I" members tailored coverage.

MEMBER OVERSIGHT – A Professional Liability Committee, comprised of IIABA members, oversees and directly influences the program. Our program was designed by agents for agents.

AGENT ADVOCACY – Supports lobbying efforts protecting your industry by contributing a percentage of every premium dollar to the funding of important advocacy efforts of the IIABA.

 **Swiss Re**
Corporate Solutions

Contact Kimberly Ostling at
kostling@wainsurance.org,
425.329.7173



BIG "I" PROFESSIONAL LIABILITY PROGRAM RISK MANAGEMENT REFERENCE GUIDE

The Big "I" Professional Liability program believes that risk management is key in not only preventing errors, but also in providing agencies with tools to more efficiently service their customers. All policyholders of the Swiss Re Corporate Solutions/IIABA professional liability program have exclusive access to the risk management information developed from our more than 30 years of experience insuring agencies. Swiss Re Corporate Solutions Americas Insurance Company is a member of Swiss Re Corporate Solutions.

BIG "I" RISK MANAGEMENT WEBSITE – E&O GUARDIAN

The website contains comprehensive information and tools such as: the common mistakes that cause E&O claims; real-life case studies for learning; best practice tips; sample disclaimers, procedures and client letters; operational self-assessments; E&O-related articles; and more. Visit independentagent.com/EOGuardian to log in. (Free)

E&O CLAIMS ADVISOR NEWSLETTER

Published monthly and emailed to agency staff, this newsletter provides valuable information on agency E&O trends and hot topics. (Free)

RISK MANAGEMENT WEBINARS



Several times per year, timely webinar sessions are featured to address emerging E&O risk management topics. Less than an hour in length and perfect for all agency staff, the webinars include detailed discussion from industry leaders on reducing exposure to E&O claims. (Free)

AGENCY E&O SEMINAR AND ADDITIONAL CREDITS

Administered by IIABA state associations, E&O seminars are an excellent way to introduce agency E&O risk management to agency personnel. Agencies with the requisite number of staff attending may qualify for a 10% premium credit. (\$)

An additional 5% risk management credit can be earned for each of the following if they are completed (up to total 20% combined):



1. At least 50% of agency staff attendance at a qualifying risk management course
2. Use of coverage checklists
3. Agency Website Operational Efficiency Review (audit) by an approved auditor

AGENCY OPERATIONAL IMPROVEMENT REVIEW

A review of your agency operations is available. You may want an experienced external eye to review your agency operation and assist with the implementation of improvements. Voluntary completion of this review may qualify you for a 10% E&O premium credit good for five years on the next renewal. (\$)



BIG "I" VIRTUAL UNIVERSITY

VU is a website with hundreds of insurance related business and technology articles, white papers and information affecting today's insurance marketplace. It also provides a forum to answer questions that can't otherwise be found in the research library through "Ask an Expert." Visit independentagent.com/vu. (Free)

BIG "I" AGENTS COUNCIL FOR TECHNOLOGY ("ACT")

ACT brings agents, carriers, vendors, user groups and industry associations together in an effort to employ the best workflows and technologies available within the independent agency system in order to improve our competitive edge. Visit independentagent.com/ACT and watch the short video briefing on the site to get a good overview. (Free)

Questions?

Contact your state association, or reach out to the Big "I" Professional Liability team at eo@iiaba.net.

We appreciate your continued support of the Big "I" Professional Liability program/Swiss Re and hope you find these risk management resources useful in helping your agency avoid E&O claims.

LEARN MORE AT WWW.EOGUARDIAN.COM.

mistake



**FREE ACCESS FOR
BIG "I" MEMBERS!**

TO ERR IS HUMAN.

*To **avoid** errors, visit E&O Guardian!*

The new E&O Guardian insurance agency risk management web site is designed to arm Big "I" members with information and tools to mitigate agency errors and omissions. Big "I" members can tap into a variety of educational materials designed to safeguard your agency. Explore the site and dive into specialty agency risk management articles on a wide variety of topics, recorded webinars, sample checklists, sample letters, an archive of newsletters, and more.



www.independentagent.com/EOGuardian

Failure to Offer?

Not on our watch.

Claims data from the Big “I” Professional Liability program consistently shows that “failure to offer” (and lack of documentation) are a leading cause of agency E&O claims. That’s why Big I Advantage has partnered with leading carriers to ensure you have easy access to additional coverages at your fingertips. Are you offering small business cyber, flood, personal umbrella and in-home business? Doing so can protect your agency from E&O claims, and increase sales and client satisfaction.

COALITION CYBER

Quote and bind in less than four minutes
Broad underwriting for risks up to \$1B revenue
Free risk assessment and cyber security tools
www.bigimarkets.com



FLOOD

Personalized support
Competitive commissions
An easy-to-use quoting platform
www.independentagent.com/Flood



PERSONAL UMBRELLA

Limits up to \$5 million (\$1M in NM)
Excess UM/UM available
Standalone coverage
www.independentagent.com/RLI



HOME BUSINESS

Affordable coverage for 145+ classes
General liability up to \$1 million
Easy underwriting
www.independentagent.com/HomeBusiness



Document client declinations with DocuSign eSignature - www.docusign.com/IIABA



Big “I” Flood members get the royal treatment from Selective.

Selective makes writing flood insurance easy through quality customer service and superior technology. Together, Big “I” Flood and Selective’s relationship helps deliver members an unparalleled flood program by offering:

- ♦ An enhanced quoting and policy issuance system
- ♦ Direct access to dedicated and skilled underwriters, assigned to each agency rather than a TPA call center
- ♦ Competitive commission structure
- ♦ Localized and experienced flood territory managers with intimate knowledge of flood insurance
- ♦ Access to free customizable marketing materials and campaigns
- ♦ Notifications of important NFIP program changes
- ♦ On site book roll-over assistance
- ♦ Carrier appointed claim adjusters and in-house claim examiners following a flooding event
- ♦ The knowledge that participation supports Big “I” advocacy efforts on Capitol Hill

Learn more and sign up today at www.independentagent.com/Flood.

SELECTIVE
BE UNIQUELY INSUREDSM

BIG SM
FLOOD.

Meet Your Selective Flood Territory Manager

SELECTIVE
BE UNIQUELY INSUREDSM



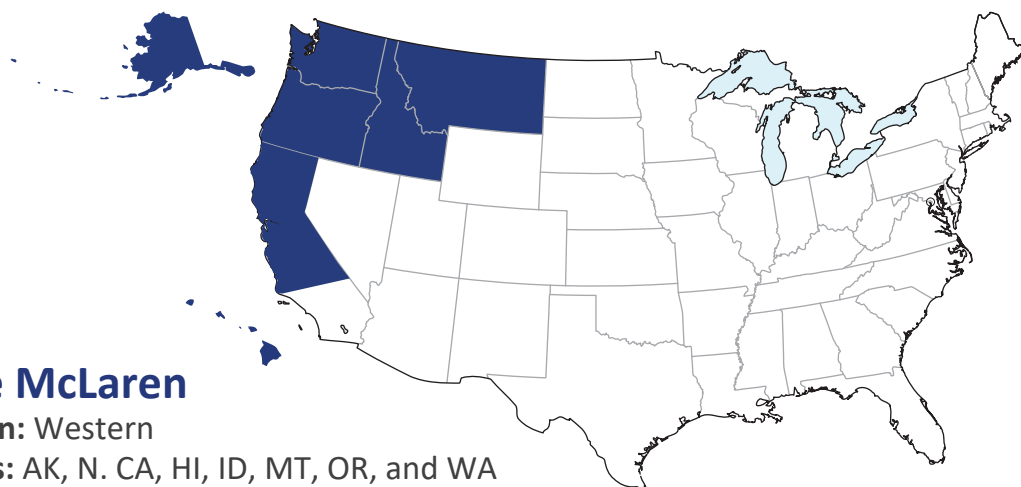
Julie McLaren

Region: Western

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E: Julie.McLaren@Selective.com

P: (916) 214-7012



Julie McLaren is a Territory Manager for Selective Insurance Company of America. Selective has been a Write Your Own carrier (WYO) for the National Flood Insurance Program (NFIP) since 1984 and is one of the top 10 writers of NFIP policies. Selective is proud to be the endorsed flood carrier for the Independent Insurance Agents & Brokers of America (IIABA). Julie has more than 12 years of experience in the Property & Casualty industry and is skilled in all facets of flood underwriting, education and marketing. Due to her extensive experience, she is your go-to resource for knowing the ins and outs of flood insurance.

Here's how Julie can help you write and service your flood insurance clients:

Regional Presence: Based in the Western region, Julie is your boots on the ground providing you with the knowledge and expertise needed to effectively speak flood. You'll see her around at Big "I" conventions and industry events teaching continuing education classes and making herself available to answer your flood insurance questions.

Expertise: Since she is dedicated to this one line of business, Julie has intimate knowledge of flood insurance and has both a national and regional awareness of specific issues.

Experience: With more than 12 years in the insurance industry, Julie understands the agent/consumer dynamic and can lend marketing support in communicating the need for flood insurance to your clients.

Underwriting Support: Julie is your go-to resource for understanding the ever changing NFIP rules and regulations.

Marketing Support: Selective has a plethora of customizable resources to help you sell more flood insurance. Julie can assist you in navigating these materials to help you identify what will work best to achieve your business goals.

Education: Julie is certified to teach continuing education classes offered by your Big "I" state association.

On-site Book Roll-over Assistance: Changing carriers can be a time consuming process. Julie and her colleagues can provide administrative support, making the transition seamless.

Selective is the only insurer that directly supports your Big "I" national and state association flood advocacy efforts in congress and with the NFIP on behalf of members.





EMPLOYEE BENEFITS MADE EASY, PEASY LEMON SQUEEZY.

Your team works hard for you. So protect them with wonderful employee benefits that work hard for them, available exclusively through your membership to the Big “I.” Guaranteed issue is available to groups of two or more with specific requirements being met. Choose from:

- ▶ **Group Life Insurance**
- ▶ **Group Short Term Disability**
- ▶ **Group Long Term Disability**
- ▶ **Group Dental**
- ▶ **Group Vision**



Don't hide from your fiduciary responsibility.

Do you sponsor a retirement plan for your agency?

There is a continuous stream of judicial and regulatory developments in the 401(k) plan world with many addressing the definition and duties of a plan fiduciary. Many plan sponsors mistakenly believe that they are not a plan fiduciary or have outsourced that role to another party. **In reality, while steps can be taken to mitigate fiduciary risk, no agency owner can eliminate that role entirely.**

The Department of Labor expects a plan fiduciary to perform responsibilities that include:

- ♦ Acting solely in the interest of plan participants and their beneficiaries with the exclusive purpose of providing benefits to them
- ♦ Carrying out their duties prudently
- ♦ Following the plan documents
- ♦ Diversifying plan investments
- ♦ Paying only reasonable plan expenses

The Big "I" MEP 401(k) Plan, available exclusively to Big "I" members, has helped many agencies fulfill their fiduciary obligation by reviewing their plan expenses and educating them on the true cost of their plan. In addition, many were able to reduce their recordkeeping and investment expenses.

Let us compare your plan to our and industry benchmarks! Don't hide—thrive. Contact us today for a complimentary plan consultation.

www.iiaba.net/Retirement

BIG i®
RETIREMENT SERVICES.



HIRING DECISIONS LEAD TO BIG QUESTIONS.

Is this candidate too
reserved?

Will they take initiative?

Can they SELL?

YOU DON'T HAVE TO WONDER. The Caliper Profile can help you see potential.

Hiring mistakes are a costly drain on your time and resources. You can help avoid them by relying on Talogy's Caliper Profile to understand if the job candidate sitting before you has what it takes.

As a scientifically validated assessment tool, Talogy's Caliper Profile accurately predicts a person's potential for success, giving you targeted results to power talent decisions. For example, **70% of job candidates matched by Talogy's Caliper Profile consistently meet or exceed their sales or performance targets.**

Big "I" members receive exclusive discount pricing on the Caliper Profile, along with a savings of 10% on other hiring assessments and staff development tools.

VISIT [TALOGY.COM/IIABA](https://talogy.com/IIABA)

TALOGY | Caliper

BIG 
BUSINESS RESOURCES.



LIFE'S TOO SHORT TO TAKE BORING CE

ABEN is the exclusive source for Big "I" Professional Liability and Swiss Re Corporate Solutions agency E&O classes via streaming video. Gain awareness of situations that can lead to E&O claims while learning valuable methods to avoid them or reduce their impact. Plus, completion will qualify your agency to earn credit on your E&O premium, subject to minimum attendance requirements.

Among the course and webcast benefits:

- ▶ **Meet eligibility toward E&O premium credit**
- ▶ **Customize a learning bundle to suit your CE credit requirements**
- ▶ **Courses are taught by experienced instructors approved to lead the class**
- ▶ **Easy-to-use platform allows the class to be taken anywhere**
- ▶ **No test needed to receive credit**
- ▶ **Viewable in a group setting, allowing discussion**

To view class options and register, go to eoguardian.com/aben. To learn more about all agency E&O course options, contact your E&O Program Manager.

EMPOWERING INDEPENDENT INSURANCE AGENTS: TRAINING, RESEARCH & TECHNOLOGY TOOLS FOR SUCCESS

AGENTS COUNCIL FOR TECHNOLOGY.

LEADING THE CONVERSATION. The Agents Council for Technology (ACT) stands 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. ACT will cultivate resources and relationships around data, connectivity, artificial intelligence, people and culture. We are at a time of unprecedented change within the industry and technology will play a crucial role in how our agencies evolve.

Chris Cline, Executive Director, ACT
chris.cline@iiaaba.net | independentagent.com/act

VIRTUAL UNIVERSITY.

FIND ANALYSIS. Tap into the collective knowledge of insurance experts from the Big "I" Virtual University. Find analysis on thousands of insurance scenarios to grow your understanding of complex topics. Empower your team with access to comprehensive information on commercial lines and personal lines, life/health and agency management. Discover articles, checklists, on-demand education and much more. Got an insurance coverage question? Receive a response from the Ask an Expert Service.

Nancy Germond, Executive Director, Risk Management and Education
nancy.germond@iiaaba.net | independentagent.com/vu

YOUNG AGENTS.

LEAD THE WAY. From opportunities to speak with legislators to sales, leadership and technology training, the Big "I" national Young Agents program encourages industry involvement from insurance professionals under 40-years-old.

The Big "I" Young Agents Leadership Institute is the annual gathering of the nation's best and brightest. Let the Big "I" Young Agents help you perpetuate your agency. Inquire about scholarship opportunities for the Big "I" Legislative Conference and leadership meeting.

Jamie Behymer, Program Manager, Young Agents
jamie.behymer@iiaaba.net | independentagent.com/youngagents

INVEST.

FUEL THE FUTURE. Invest is a nonprofit program that educates individuals on insurance, financial literacy and risk management, and encourages the pursuit of insurance careers with a focus on independent agencies. The program is dedicated to improving insurance literacy and attracting the next generation of diverse talent into our industry.

Invest volunteers and teachers have taught more than 33,000 high school, community college and workforce development students how to become an insurance agent.

Whitnee Dillard, Executive Director, Invest
whitnee.dillard@iiaaba.net | investprogram.org

BEST PRACTICES.

BE BETTER. The Big "I" Best Practices study provides a chance for all Big "I" members to learn from the top agencies across the United States. Via research, resource guides and webinars, the comprehensive study provides key strategies by revenue category to help you improve overall agency performance and increase agency value.

Jennifer Becker, Sr Director, Agent Development, Research and Education
jennifer.becker@iiaaba.net | independentagent.com/bestpractices

DIVERSITY COUNCIL.

EMBRACE INCLUSION. The Big "I" Diversity Council is focused on engaging and developing a more sustainable independent agency network that reflects, represents and serves our diverse populations countrywide. The council is a collective of agents, insurance company representatives and association leaders.

Find tools to drive growth and more inclusive business practices for your agency. Be sure to also subscribe to the Inclusion in Action Newsletter.

Anitra Rivera, Program Director, Diversity and Inclusion
anitra.rivera@iiaaba.net | independentagent.com/diversity



ELEVATE YOUR INSURANCE EXPERTISE WITH THE BIG "I" VIRTUAL UNIVERSITY!

Tap into the collective knowledge of insurance experts on the Big "I" Virtual University. Find analysis on thousands of insurance scenarios to help you grow your understanding of complex topics, better serve your clients and communicate effectively. Broaden your insurance knowledge to reduce possible risks. When you or your team have technical insurance questions, we can help.



RESEARCH LIBRARY.

Discover comprehensive information on a wide range of insurance topics, including agency management, commercial and personal lines, certificates of insurance, life & health, checklists, and more. Virtual University curates the experience and expertise of the industry's leaders into detailed and searchable content to help you quickly navigate the world of insurance. This content is free to Big "I" member agencies and staff.



ASK AN EXPERT.

When you or your staff have tough coverage questions or face a claim denial that just doesn't make sense, turn to us! Our team of over 50 insurance experts is ready to assist with complex insurance inquiries. Get the guidance you need from professionals who understand the industry inside and out.

Ask a question and get answers from a team curated specifically for your situation! Responses from our team usually take five business days.



CRITICAL INSURANCE ISSUES.

Each day our industry is faced with new challenges that will affect the long-term success of independent agencies. The Big "I" VU regularly produces important content to keep you informed on market conditions, coverage changes, regulations and more.



ONLINE EDUCATION.

Our powerful collaborations provide access to continuing education and professional development course designed to meet insurance agents where you are in your career.



DISCOVER VU TECHNICAL CONTENT TODAY!

Visit: independentagent.com/VU

Email: virtualuniversity@iiaba.net

Subscribe: Insurance Illustrated



Big “I” Members Receive Complimentary ACORD Forms Licenses

ACORD charges an end-user license fee (EUL) for use of its forms. Big “I” covers the cost of this fee for members with revenue less than \$50 million. This applies whether you access forms through your AMS, redistributor, or directly through ACORD Advantage Plus Program.

Visit independentagent.com/ACORDLicense to learn more.

ACORD

BIG  SM



ACT NEWS
Learn More



ACT EVENTS & MEETINGS
Learn More



ACT WORK GROUPS
Learn More



ACT SUPPORTING MEMBERS
Learn More



**ACT MISSION
& MEMBERSHIP BENEFITS**
Learn More

**You don't have to be
a tech expert to be
part of our team!**

We NEED your insights and experience to help guide how agents can leverage technology to enable their business strategy.

HELP LEAD THE INSURANCE INDUSTRY'S TECHNOLOGY CONVERSATION

Our goal is to make it equitable for everyone to have a voice at the table, from the largest to the smallest carrier, agency, or technology provider.

WHAT IS THE BIG "I" AGENTS COUNCIL FOR TECHNOLOGY?

This forum of agents, brokers, technology providers, carriers, and other industry groups conducts research, provides collaborative recommendations and creates resources to help independent agents make strategic decisions about the use of technology in their agencies.

GET THE INSIDE ADVANTAGE

Work with carriers, technology providers and other agency leaders to develop tools to help the independent agency system thrive. Through our work groups, ACT members come together to share insights and create industry-wide education for all Big "I" agents.

ACT provides recommendations on emerging trends, cybersecurity, customer experience, data & analytics, disaster planning, and other tech-related focus areas.

BENEFITS OF SUPPORTING ACT

- ✓ ACT membership is INCLUDED for all Big "I" member agents through the generosity of our ACT supporting partners
- ✓ Engage on work groups and participate in our industry events alongside other agents, carriers, and technology providers
- ✓ Gain access to a forum for insurance companies, agencies, technology providers, associations, and user groups to explore technology trends
- ✓ Collaborate with industry innovators to create roadmaps for effective technology solutions

CONTACT US TODAY

independentagent.com/ACT
act@iiaba.net



BIG *i*
AGENTS COUNCIL
FOR TECHNOLOGY.

Chris Cline
Executive Director

chris.cline@iiaba.net

Ginny Winkworth
Program Manager

ginny.winkworth@iiaba.net

FIND TOP TALENT

Does the thought of hiring a new employee leave you overwhelmed? Are you seeing turnover, or posting a job, but just aren't finding the "right" person?

YOU'RE NOT ALONE.

Find the right recruits with Big "I" Hires, a one-stop resource for independent insurance agencies to identify, hire and assess top-performing Producers and CSRs.

FIND AND RECRUIT.

Recruiting Support

IdealTraits can help agencies of all sizes hire top performing sales and staff with the ability to post jobs, receive candidates, send assessments and identify the right recruit through a variety of recruiting sites and the Big I job board.

POST JOBS FREE ON MULTIPLE JOB BOARDS WITH ONE SUBMISSION!

Receive Your Candidates

Job Posting

Unlimited Candidates

Unlimited Assessments

Applicant Tracking

SUBMIT, RECEIVE & REVIEW ASSESSMENTS.

Identify and hire who is best for your agency

READY TO GET STARTED?

All prices include Priority 1-on-1 onboarding, 2 Custom job ads, and Premium support .

\$499

PER LOCATION / 90 DAY ACCESS

\$999

PER LOCATION / 1 YEAR ACCESS

ASK
ABOUT
FREE
ACCESS

IDEALTRAITS
NOW SUPPORTS
LINKEDIN HIRING
AND AI AD
CREATOR

Visit www.bigihires.com to schedule a demo or call 248.387.2717 and mention your Big "I" member status.



PACKAGES TO FIT YOUR AGENCY HIRING NEEDS!

Take a look at all the cutting-edge features in the IdealTraits platform.

FREE

Free limited account access is a Big "I" member benefit

Features include:

- Post Jobs to your State Job Board with Big "I" Hires ✓
- Access to Customizable Insurance-Specific Job Ad Templates ✓
- Share Ads to Social Media (Facebook, LinkedIn, Twitter) ✓
- Applicant Tracking System to Stay Organized from Resume Submission to Hire ✓
- Customize Your Career Page for Agency Website ✓
- Access to Customizable Email Templates including Offer Letters ✓
- Access to IdealTraits Help Center and Blog ✓
- Phone, Email, & Chat Support Available ✓
- Access to Add-Ons (Background Checks, Video Interviewing, etc.) ✓
- Access to Integrations (Zoom, Calendly, etc.) ✓
- Eligible to Receive 4-Step Hiring Process + Interview Questions ✓
- Quick Start Tour to Optimize Platform Use ✓
- Access to Insurance-Specific Personality Assessment ✓
- Potential to Post Jobs to 100+ Job Boards ✓
- 2 Custom Job Ads Written by IdealTraits Expert ✓

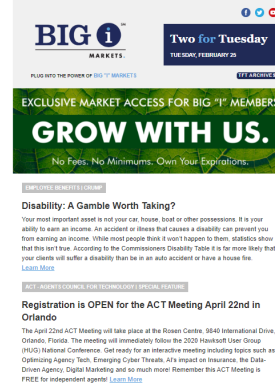
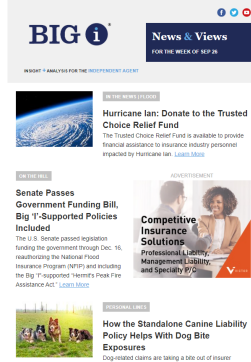
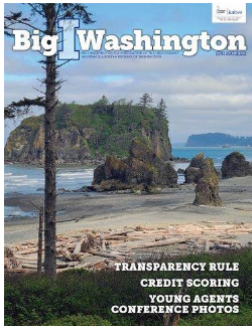
PAID

90-day | 1-Year

Features include:

- Post Jobs to your State Job Board with Big "I" Hires ✓
- Access to Customizable Insurance-Specific Job Ad Templates ✓
- Share Ads to Social Media (Facebook, LinkedIn, Twitter) ✓
- Applicant Tracking System to Stay Organized from Resume Submission to Hire ✓
- Customize Your Career Page for Agency Website ✓
- Access to Customizable Email Templates including Offer Letters ✓
- Access to IdealTraits Help Center and Blog ✓
- Phone, Email, & Chat Support Available ✓
- Access to Add-Ons (Background Checks, Video Interviewing, etc.) ✓
- Access to Integrations (Zoom, Calendly, etc.) ✓
- Eligible to Receive 4-Step Hiring Process + Interview Questions ✓
- Quick Start Tour to Optimize Platform Use ✓
- Access to Insurance-Specific Personality Assessment ✓
- Potential to Post Jobs to 100+ Job Boards ✓
- 2 Custom Job Ads Written by IdealTraits Expert ✓

Publications and Social Spaces



IIABW Bulletin

Bi-monthly e-newsletter

Big "I" Washington Magazine Quarterly

Independent Agent

IIABA monthly print magazine

News & Views

IIABA weekly e-newsletter on current industry issues

Two for Tuesday

Big "I" Markets weekly e-newsletter about market access products

Insurance Illustrated

Virtual University bi-weekly newsletter with coverage related topics

ACT News

ACT monthly electronic newsletter

IIABW Facebook

www.facebook.com

(Search: Independent Insurance Agents & Brokers of Washington)

Big "I" Facebook

www.facebook.com/independentagent

Big "I" X

www.x.com/IndAgent

Trusted Choice® Facebook

www.facebook.com/TrustedChoice

Events and Education

Events

Annual Conference

The insurance industry conference – typically held in September - brings together the best the industry has to offer in education and networking. Learn from industry experts, network with fellow agents and company reps and enjoy fine hospitality.

Day at the Capital

Each year IIABW brings industry professionals to Olympia to learn about the legislative process, the issues related to agents and consumers and to lobby our elected leaders. Legislators want to hear from us about your ability to succeed in the Washington business climate. Join us for this annual pilgrimage.

Young Agent Conference

This is a great opportunity for producers, CSRs, marketing reps and underwriters (both you and not-so-young) to learn from each other in an informal setting. Agenda typically includes continuing education courses, discussion panels, guest speakers, combined with social activities.

Education

IIABW is nationally recognized as a leader in insurance education and premiere provider of continuing insurance education in Washington. We provide insurance professionals quality education through live seminars, self study courses, web-based education and recorded webinars. Check out our calendar at wainsurance.org/education.

IIABW members can access more than 40 high quality webinars through the Agents and Brokers Education Network (ABEN).

Go to <https://iiawa.aben.tv/> for more information and to register.

Use code: 1stABEN40 to save 40% off your first webinar!



Submit Staff Names and Email Addresses to Receive Your Full Membership Benefits

There are a host of online resources available exclusively to Big "I" members that are locked behind a firewall. The key to accessing proprietary spaces on the Big "I" website is your email address. But, it must be listed in the Big "I" database for you to be recognized. Please provide names and email addresses of each person at your agency so the information can be recorded. The more staff members we have on record, the more value you can receive from your Big "I" membership. Read descriptions of benefits and take a quick peek at their websites:

[Big "I" Virtual University \(VU\)](#) - an online education resource offering access to insurance, business and technology articles; the ['Ask an Expert'](#) service; many full sample ISO forms; white papers; recorded webcasts and information on issues affecting today's insurance marketplace. Many agents view VU as worth the cost of membership. Virtual University is an easily accessible website created, designed, and maintained solely for agents and brokers to use as a powerful resource of information.

[Big "I" Alliance Blue](#) - an online market access system available exclusively to Big "I" members featuring no fees, no volume commitments and competitive commissions along with ownership of expirations. Products range from affluent homeowners to bonds to small business with cyber liability and special event coverage.

[Legal Advocacy](#) - a resource helping members navigate a plethora of business and legal issues such as carrier contract reviews, trademark use and infringement, antitrust and federal laws and regulations effecting the insurance industry. The site includes memorandums and FAQs to assist members in complying with the complex legal requirements of federal laws and regulations that affect their agency and brokerage businesses.

[E&O Guardian website](#) – features more than 700 pages of insurance agency risk management information, available exclusively and at no cost, to Big "I" members. The site includes claim examples, risk management articles, E&O Claims Advisor newsletters, sample disclaimers, sample customer letters, and a webinar and podcast archive.

[Trusted Choice® Agents Resources](#) – a one-stop shop for all advertising and marketing needs for Trusted Choice® agents. Access logos, advertising material, branding guidelines, plus your agency's profile and account information. Learn more about what the brand is doing for your agency and take advantage of free digital and print campaigns.

[Trusted Choice®.com Agent Portal](#) – As part of your Big "I" membership, all agencies are listed in the consumer search site TrustedChoice.com. Your profile is based on information in our member database. Log into to review what consumers and businesses see on this search engine when looking for a Trusted Choice® agent. Or, upgrade to an Advantage Profile for enhanced features.

Note: we do not distribute or sell user information. Your email information is safe with us and will never be shared outside of the Big "I" organization.

Submit your agency staff names and email addresses to: Suzanne Arnett, sarnett@wainsurance.org

Key Program Contacts



Program websites contain complete information on each program; check online first for quick answers!

Daniel Holst, Executive Vice President

Association operations
dholst@wainsurance.org
425.649.0102, ext. 101

Agency Errors and Omissions Insurance and related EPL and Cyber Liability

Kimberly Ostling, Director of Insurance Programs
kostling@wainsurance.org
425.329.7173

RLI Personal Umbrella and In-Home Business

Ridge Ostling, Program Director, RLI
rli@wainsurance.org
425.336.0847

IIABW Member Services

Suzanne Arnett, Director of Member Services
Membership, Events, CE, Young Agents
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425.336.0461

Big "I" Alliance Blue

www.bigimemberalliance.com/blue
Nics Lopez, Technical Support
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703.647.7800

Standard Personal Lines

www.bigimemberalliance.com/blue
Karen Lancaster, Director, Personal Lines
karen.lancaster@iiaba.net
800.221.7917, ext. 5406

Commercial Lines

www.bigimemberalliance.com/blue
Gwen Lombardi, Sr. Underwriter, Commercial Lines
gwen.lombardi@iiaba.net
800.221.7917, ext. 5469

Big "I" Retirement and Benefits

www.independentagent.com/retirement
Christine Muñoz, Assistant Vice President,
Big "I" Retirement and Benefits
christine.munoz@iiaba.net
800.221.7917, ext. 5466

Big "I" Virtual University

www.independentagent.com/vu
Nancy Germond, Executive Director
nancy.germond@iiaba.net
800.221.7917, ext. 5451

Agents Council for Technology

www.independentagent.com/act
Chris Cline, Executive Director
chris.cline@iiaba.net
800.221.7917, ext. 5452

Trusted Choice Agent Resources

www.trustedchoice.com/agents
Joseph Cox, Marketing Manager
joseph.cox@iiaba.net
800.221.7917, ext. 5402



iiabw

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425.649.0102
www.wainsurance.org

About IIABW

The Independent Insurance Agents and Brokers of Washington (IIABW) was founded in 1910 as a non-profit trade association organized for the benefit of independent insurance agents and brokers across the state. IIABW serves over 500 insurance agencies and branches and provides them legislative/regulatory advocacy, access to markets, publications, and education. IIABW's mission is to position our members for success and foster a favorable business environment and a healthy insurance industry to better serve individuals and their communities.

