

Trusted Choice[®] Resources and TrustedChoice.com

How they work together



Trusted Choice

Offers resources, marketing assistance, funding and more



TrustedChoice.com

Delivers leads and referrals to agencies



Independent Agents

Benefit by converting more leads into sales and expanding your agency's reach

TrustedChoice.com pushes leads towards your agency while Trusted Choice resources help you improve your agency image and convert leads into sales at a higher rate

TRUSTED CHOICE® BASICS



Q. What is trusted choice?

Trusted Choice® is the national marketing brand created exclusively for Big "I" (Independent Insurance Agents & Brokers of America) members to help consumers understand the value that an independent agent offers. This is not a market access program but a brand that is designed to highlight the strengths of independent insurance agents: **Choice, Customization, and Advocacy.**

Q. What is the Big "I"?

The Big "I" is a national association offering more than 25,000 independent agency locations and the employees the tools, resources, advocacy and support to maintain excellence in business and customer service. Independent insurance agencies and brokers represent more than one insurance company so they can offer a clients a wider choice of auto, home business, life and health coverage as well as retirement and employee benefits products.

Q. Why Trusted Choice?

Trusted Choice was created by the Big "I" volunteer interdependent insurance agents and carrier partners to to highlight the benefits independent insurance agencies and brokerages offer consumers: choice of companies, customization of policies and advocacy support. Trusted Choice is one of the many exclusive benefits afforded to Big "I" members.

Q. What are the benefits of being part of the Trusted Choice brand?

Trusted Choice is the premier consumer brand for independent insurance agents and provides national advertising and other strategic tools to reach and influence consumers. The brand offers IA's greater consumer awareness by providing top quality resources to assist them in effectively marketing and advertising in their local marketplace.

Trusted Choice agencies benefit from the following:

- Licensed use of the consumer tested logo and Pledge of Performance.
- Exposure through national advertising and public relations campaigns.
- Customizable advertising materials.
- Informative consumer articles that can be used in agency newsletters, websites, social media or mailing.
- Support from many Trusted Choice industry partners.
- **Marketing Reimbursement Program:**
Receive up to \$1500 for co-branding with the Trusted Choice logo, upgrading your website with a Trusted Choice preferred partner or upgrading your subscription on [trustedchoice.com](https://www.trustedchoice.com), the brand's consumer-facing website that directs customers to nearby Trusted Choice agents.

Q. Are there competitors that offer Independent Agents access to similar services?

There is another trade association for independent agents, but they do not have a branding program similar to Trusted Choice.

Q. How do Carrier Partners benefit from the relationship with Trusted Choice and the Big “I”?

Trusted Choice Carrier Partners support the brand as a way of demonstrating their commitment to the independent agency system, and their confidence in their agents' unparalleled value.

Q. Are Trusted Choice and [TrustedChoice.com](https://www.TrustedChoice.com) available to agents in all states?

As long as an agent is a member of the Big “I,” they have exclusive access to Trusted Choice and [TrustedChoice.com](https://www.TrustedChoice.com).

BECOMING A TRUSTED CHOICE AGENT

Q. How does an agent qualify to be part of the Trusted Choice brand?

If an agent is a member of their respective Big “I” state association, they are automatically a member of the national association and have access to Trusted Choice. As long as they agree to the Trusted Choice License Agreement (basically saying they won't use the logo or brand inappropriately), they are considered a Trusted Choice member agency and have access to all of the tools and resources.

Q. If my agent is unsure if they are a part of the Trusted Choice brand, how can they find out?

All Big “I” members are automatically enrolled as Trusted Choice members. An agent can contact their local state chapter or the national office to confirm membership status.

TRUSTEDCHOICE.COM BASICS



Q. What is TrustedChoice.com?

TrustedChoice.com is a consumer-facing website dedicated to attracting online insurance shoppers to members of Trusted Choice. The site offers consumers access to industry research, rate comparisons, and the chance to evaluate and select an independent agent who can meet their unique needs and advocate on their behalf.

TrustedChoice.com also provides:



Personal lines quoting for Auto and Home



Resources for research on specific lines of insurance



Blogs written by trusted internet authors



Educational content to help consumers understand the value of the independent agent

Q. How does an agent sign up for TrustedChoice.com?

- Current IIABA members receive a Basic listing with a profile under the Agent Directory on TrustedChoice.com. To update your profile, please call Client Success at (855) 372-0070.
- To be actively recommended on TrustedChoice.com to buyers who enter their criteria, an agency needs to subscribe to an Advantage profile or Member Plus profile.
- Agents who are not currently a member of the Big "I" must first sign up for the IIABA to have a presence on TrustedChoice.com

Q. What is the value proposition for agents?

TrustedChoice.com brings the value of the Trusted Choice national brand together with the power of search engine optimization (SEO), driving over 7 million yearly insurance shoppers to the site to connect with an independent agent. This combination of technology and brand recognition provides members with web presence and consumer reach that would be impossible to achieve individually. Additionally, members may choose to subscribe to an "Advantage profile" which provides additional value over a "Basic profile."

Q. What are my subscription options?

Trusted Choice offers three Website Profile Options:

BASIC • ADVANTAGE • MEMBER PLUS

A Basic profile is only included in the Agent Directory of TrustedChoice.com. The profile displays the agency name, address, and phone number.

An Advantage profile is included in the Agent Directory with a “Recommended Agency” label. It is also actively recommended to insurance shoppers when they enter their criteria that include LOB, current insured situation, estimated premium, and contact information.

- Agencies can set their preferred appetite to attract the shoppers they want.
- Access to a Trusted Choice Agency dashboard that tracks their opportunities and referrals.
- Advance placement on consumer search results pages.
- A complete profile that allows an agent to tell their unique story – which includes a “Recommended Agency” banner; badge on the listing for additional credibility; agency logo; “About Us” statement; listing of staff; personalized URLs; easy social sharing buttons; agency social media and website links; ratings and reviews from clients; video; and listing of detailed insurance services.
- Access to **Claim-It leads**. These are a bucket of leads/consumers that did not select an agency on Trustedchoice.com, yet expressed interest. Advantage agencies get notified in real-time when one of those leads goes into the bucket.

A MEMBER PLUS PROFILE is recommended to insurance shoppers when they enter their criteria.

- Agencies can set their preferred appetite to attract the shoppers they want.
- A profile that allows an agent to tell their unique story and includes an agency logo, “About Us” statement, personalized URLs, and listing of detailed insurance services.

Q. How does an agent become an Advantage?

All Trusted Choice members start off as with a Basic profile. Trusted Choice agencies can subscribe to an Advantage or Member Plus profile in order to be actively recommended to insurance shoppers.

They can visit TrustedChoice.com/Advantage to learn more.

Q. Does an agent have to pay to participate?

The Basic profile is free to all Trusted Choice members. The Member Plus profile is only available and free to members of select state associations who participate in the program. Visit TrustedChoice.com/Advantage/Sign-Up for a listing of states for Member Plus and detailed pricing of Advantage.

Q. How does the referral process work?

Consumers who visit TrustedChoice.com and enter their criteria are matched with recommended Advantage and Member Plus agencies. Once a consumer selects an agency, then the agency receives a referral notification with the details of the insurance shopper and their preferred contact method.

There are two potential referral types available after a consumer requests contact. With both phone and email referrals, the agent is notified via email from TrustedChoice.com when they have received a referral.



Phone referrals

The consumer simply calls the agency they've selected using a tracked phone number placed on the agency profile in TrustedChoice.com. (Note: This is not the agency's actual phone number. While it does ring through to the agent, it allows TrustedChoice.com to monitor the referrals.) The consumer can also select a preferred time to be contacted by the selected agency.



Email Referrals

This generates an email message to the selected agency directly from TrustedChoice.com. The agency can then reach out on their own to the consumer. Consumers may also find an agent's profile on TrustedChoice.com and make contact with them via their website or through social media (however, these methods are not tracked by Trusted Choice).

Q. Can an agent control which types of referrals they receive?

Yes, only available for Advantage and Member Plus agencies. Through the TrustedChoice.com Agency Dashboard, agents can identify which carriers they represent and choose from which types of products they prefer to receive consumer referrals.

Q. Are the referrals exclusive to a single agent?

No, consumers may request quotes from multiple agents. Most often, they only select one agency, but we've seen as many as three agents selected for the same risk.

Where can my agents and I go to learn more?

www.trustedchoice.com/agents

Free marketing resources for agents

www.trustedchoice.com

The consumer-facing TrustedChoice.com site

trustedchoice.com/Advantage

The agent-facing portion of TrustedChoice.com provides more information to the agent with regard to who and what TrustedChoice.com is, as compared to the actual TrustedChoice.com site.