

# Trusted Choice Company Partner Meeting Update

November 17, 2021



## **Introductions**

- Vinnie Savarese SVP Company Relations
- Chip Bacciocco CEO
- Marc Burdell SVP Sales & Marketing
- Viviana Buzo Marketing Director
- Christine McLaughlin Senior Account Manager
- Mike Wnek SVP Operations

# Trusted Choice.com

# Agenda

- TrustedChoice.com Company Partners
- New TrustedChoice.com Homepage
- New Company Funnels
- New TrustedChoice.com Marketing & Resources Page
- New TrustedChoice.com Market Finder for Agents
- Co-marketing Opportunities Agent Advantage Program Marc
- Company Partner Leads Program Chip
- Q & A All

# Trusted Choice.com

## **Company Partners**

- Andover
- Acadia
- Arbella
- BTIS
- Central
- coterie
- Dryden Mutual
- EMC
- EMC National Life
- Encova
- Farmers of Salem
- FedNat
- Florida Peninsula
- Foremost
- Hanover
- Hiscox
- ICW Group

- Kingstone Insurance Company
- Life Assurance Company of America
- Liberty Mutual
- MAPFRE
- Mercury
- MMG
- MSA
- Nationwide
- Norfolk & Dedham
- NYCM
- Ohio Mutual
- Orion180
- Peerless
- PersonalUmbrella.com
- Pinnacol
- Plymouth Rock

- Preferred Mutual
- Prime Insurance
- Progressive
- RLI
- Safeco
- Safety Insurance
- Selective
- St. Johns
- State Auto
- Sterling
- Stillwater
- The Beacon Mutual
- Travelers
- Vermont Mutual
- West Bend Mutual
- Westfield

# TC.com SEO Performance

### as of October 2021

- X 427,991 ranking keywords/phrases
- X 52,500 indexed pages of content
- X 69,104 keywords/phrases rank on page ONE of Google
- X 17,981 keywords/phrases rank in TOP THREE positions on page <u>ONE</u> of Google
- X 13.9 million impressions

# New TrustedChoice.com Homepage



# Why Create a New TrustedChoice.com Homepage?

- Enhance the visibility of Participating Company Partners
  - With Insurance Consumers
  - With Independent Agents
- Increase Insurance Consumer Options
  - The Homepage is the most effective landing page
- Increase Traffic Be recognized as <u>THE</u> Insurance Expert

**Trusted Choice** 

#### Get the best insurance with a trusted independent agent

Find the perfect agent to shop multiple insurance companies on your behalf, saving you time and money





# Find a Trusted Choice insurance agent near you

Find the perfect agent to shop multiple insurance companies on your behalf, saving you time and money

Get Matched, Get a Quote

Or, get matched with an insurance company





BEST WISCONSIN INSURANCE COMPANIES

**Trusted Choice** 



















#### Find an Independent Agent

Get Matched with an Agent Agent Directory by State



#### Find an Insurance Company

Get Matched with a Company Company Directory by State

#### What type of insurance do you need?

Business Insurance Home, Auto & Personal Insurance Life & Annuities

Looking for the best insurance?

Get a Quote

or call (844) 499-7575

your behalf, saving you time and money

Get Matched, Get a Quote

Or, get matched with an insurance company

















# Time to find the right independent insurance agent for you.

With a trusted expert in your corner, finding the perfect combo of coverage and cost is a breeze.

How am I matched with an agent?

Have a question, get answers.





Call



#### Let's get started.

What type of insurance are you looking for today?



#### Personal

Protection for you, your family and all your personal property





#### Business

Protection for your business, its property, employees, and customers





#### Life & Annuities

Financial protection for your loved ones or for your retirement







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Get Matched with an Agent Agent Directory by State



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#### **National Directory of Independent Insurance Agents**

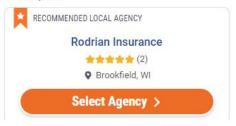
Over 250,000 Independent Insurance Agents

Select a state to find an insurance agent near you.



We recommend these insurance agents near Milwaukee, WI.







Insurance Resources V



**Trusted Choice** 

#### **Best Wisconsin Independent Insurance Agents**

#### Insurance Agency Directory > Wisconsin



#### Find the right Trusted Choice Insurance agent near you.

With 416 independent agencies in Wisconsin, rest assured our recommended agents offer you more options, better value and they're local.

Recommended Independent Insurance Agencies

- Advantage Independent Insurance Agencies ✓ Verified contact and coverage details
  ✓ Consumer reviews
  ✓ Coverage content
- Independent Insurance Agencies ✓ Verified contact and coverage details
- Independent Insurance Agencies ✓ Basic agency details

Click the map to zoom in to an agency location, click an agency for more information.

#### We recommend these insurance agents near you.











#### Find an Independent Agent

Get Matched with an Agent Agent Directory by State

#### Find an Insurance Company

Get Matched with a Company Company Directory by State



#### What type of insurance do you need?

Business Insurance Home, Auto & Personal Insurance Life & Annuities

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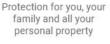




#### Let's get started.

What type of insurance are you looking for today?









#### Business

Protection for your business, its property, employees, and customers





#### Life & Annuities

Financial protection for your loved ones or for your retirement







#### Find an Independent Agent

Get Matched with an Agent Agent Directory by State

#### Find an Insurance Company

Get Matched with a Company Company Directory by State



#### What type of insurance do you need?

Business Insurance
Home, Auto & Personal Insurance
Life & Annuities

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your behalf, saving you time and money

Get Matched, Get a Quote

Or, get matched with an insurance company 3















#### **National Insurance Company Directory**

Trusted Choice

Find an insurance company that fits your needs and connect with one of their agents.

#### Select a state to find an insurance company near you.



#### What type of insurance coverage are you looking for?





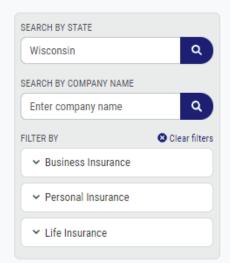




NATIONAL INSURANCE COMPANY DIRECTORY

#### **Best Wisconsin Insurance Companies**

Find an insurance company that fits your needs and connect with one of their agents.

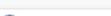


Recommended companies are highly valued by their partnering Trusted Choice insurance agents. They have partnered with TrustedChoice.com and confirmed their insurance appetite information and have chosen to participate in the National Insurance company directory.

Verified companies have partnered with TrustedChoice.com and confirmed their insurance appetite information and have chosen to participate in the National Insurance company directory.

Join the IA Network - Become a recommended insurance company partner





RECOMMENDED COMPANY

Insurance Companies

#### **ICW Group Insurance Companies**

Putting our customers first



Partner with ICW Group Insurance Companies to meet your workers' compensation needs. As a national, full-service, workers' compensation carrier, ICW Group provides you full access to a wi...

**View our Recommended Agents** 

Learn more





RECOMMENDED COMPANY

**PROGRESSIVE** 





\*\*\* AM Best Rating

At Progressive, protecting what matters to you, matters to us. Progressive has grown into the #1 personal auto insurer through independent agents by delivering quality, affordable coverag...

**View our Recommended Agents** 

Learn more











#### Encova



As a comprehensive one-stop shop, Encova is a provider of peace of mind - for our agents, our policyholders, and the communities we serve. That peace of mind comes from the personal relat...

**View our Recommended Agents** 

Learn more









#### Why choose Encova for your insurance needs?

As a comprehensive one-stop shop, Encova is a provider of peace of mind – for our agents, our policyholders, and the communities we serve.

That peace of mind comes from the personal relationships we've built on trust and accountability. Whether we're customizing a policy, filing a claim, or serving our communities, your local Encova neighbor will be with you at every step in life's journey

#### Where does Encova do business?

Encova provides the following insurance coverages by state.



#### Company Information

#### Founded in

1928

#### AM Best rating

A (Excellent)

#### Website

encova.com

#### Headquarters

471 East Broad Street Columbus, OH 43215

#### **Customer service**

866-452-7425



#### What discounts does Encova offer?

Wespak and Wespak Estate (people with more complex risks) policies provide coverage for your home and auto needs.



#### What business insurance does Encova offer?

Encova specializes in reliable BOPs and workers' compensation policies for their customers. By combining Motorists Insurance Group with Brickstreet Insurance, Encova is able to offer an expansion of business insurance products and services with decades of industry experience. From affordable commercial packages to outstanding risk management services, Encova pushes innovation for both their agents and policyholders with combined insights and professional assistance.

#### Participation with

25

1001 Industries

619

Trusted Choice Independent Agents

#### **Business coverage types**

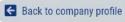
Builders Risk	0	Business Owners Package (BOP)	0	Business Vehicle	0
Contractors Equipment	0	Cyber Liability	0	Directors & Officers	0
Employment Practices Liability	0	Errors & Omissions	0	General Liability	0
Inland Marine	0	Professional Liability	0	Property	0

- Cash Out Loss Settlement Option-Dwelling/Contents
- Guaranteed Replacement Cost-Dwelling
- ✓ Personal Injury
- Equipment Breakdown
- ✓ Identity Theft
- Disappearing Deductible-Home
- Higher Basic Coverage Limits-Auto Replacement Cost-Auto
- Significant Auto Discounts



#### Encova Agent Resources

Whether you're an existing agent or interested in partnering with Encova, these agency resources will have the answers. Get Started >> Company Directory > Wisconsin Companies > Encova





#### Welcome to Encova Agent Resources

Your one-stop resource for agent questions and answers, whether you're an existing agent or interested in partnering with Encova.

#### A commitment to Encova independent agents

Encova Insurance sells personal lines products exclusively through independent agents. That means we know our agents' businesses as well as our own and we're committed to helping them succeed. Our employees are consistently recognized by agents as among the best in the business. We work with agents to develop mutually beneficial plans and provide dedicated underwriters for each agency.

#### **Contact Information**

For technical help, call:

or email:

3 800.243.0210 ext:4306161

agencyhelp@encova.com

Agent Resource Links

Agent Login

- » Read our Agent Blog
- » Encova Agents Association

Why Join Encova?

- » Sign up to become an agent
- » Learn more about Encova agents

Encova Risk Appetite

powered by Ask Kodiak



**Workers Compensation** 

Get Started >>

Show more



Umbrella

Get Started >>

Show more





#### Find an Independent Agent

Get Matched with an Agent Agent Directory by State

#### Find an Insurance Company

Get Matched with a Company Company Directory by State

#### What type of insurance do you need?

Business Insurance Home, Auto & Personal Insurance Life & Annuities



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#### **Personal Insurance**

Your home. Your car. Your family. Protecting what you love should always be your first priority. Let's find the right agent for you.

How am I matched with an agent

Have a question, get answers.







(A)

## Now, more specifically, what type of **personal protection** are you looking for?

Select up to three coverages...



#### Show More

Bundling your policies together can make life simpler AND save you money. You can always work with your agent to figure out your best coverage options to bundle.



#### Top Insurance

Business Insurance

Boat Insurance

Car Insurance

Collector Cars

Commercial Vehicle

Condo Insurance

Farm Insurance

Home Insurance

Landlord Insurance

Life Insurance

Professional Liability

Renters Insurance

Small Business

Umbrella Insurance

Workers' Compensation

#### Top Industries

Bakeries **Grocery Stores** 

Hair Salons Breweries

Butcher Shops Hotels & Motels

Candy Shops Non Profits

Churches Restaurants

Coffee Shops Retail Stores

Software Companies Construction

Insurance by Business Type Daycares

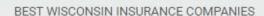
Flower Shops Insurance by State

Looking for the best insurance?

**Get a Quote** 

or call (844) 499-7575



















#### Top Insurance

Business Insurance

**Boat Insurance** 

Car Insurance

Collector Cars

Commercial Vehicle

Condo Insurance

Farm Insurance

Home Insurance

Landlord Insurance

Life Insurance

Professional Liability

Renters Insurance

Small Business

Umbrella Insurance

Workers' Compensation

Top Industries

Bakenes

**Trusted Choice** 

Breweries

Butcher Shops

Candy Shops

Churches

Coffee Shops

Construction

Daycares

Flower Shops

**Grocery Stores** 

Hair Salons

Hotels & Motels

Non Profits

Restaurants

Retail Stores

Software Companies

Insurance by Business Type

Insurance by State

Looking for the best insurance?

**Get a Quote** 

or call (844) 499-7575

TODAY















BREWERY INSURANCE

#### Finding the Right Insurance for Your Brewery

(Getting protection has never been easier)

Trusted Choice | March 13, 2020



Trusted Choice



The number of microbreweries, craft breweries and brewpubs in the U.S. has exploded in the last decade or so, bringing a whole new level of anxiety to the Saturday morning beer run. Today there are over 2,300 breweries or brewpubs in the U.S., and each one is as unique as the one across the street.

Fortunately, our independent insurance agents are here to help you shop multiple carriers and quotes at the same time. They'll help connect you with the right coverage for your business and keep your hopped-up dreams afloat. But first, let's talk a bit more about why you need coverage and what kind you need.



#### BY INDUSTRY

Boat



#### Top Insurance

Business Insurance

Boat Insurance

Car Insurance

Collector Cars

Commercial Vehicle

Condo Insurance

Farm Insurance

Home Insurance

Landlord Insurance

#### Top Industries

Candy Shops

Coffee Shops

Construction

Churches

Bakeries Breweries

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Renters Insurance

Small Business

Life Insurance

Umbrella Insurance

Workers' Compensation

**Grocery Stores** 

Hair Salons

Hotels & Motels Butcher Shops

Non Profits

Restaurants

Retail Stores

Software Companies

Insurance by Business Type Daycares

Flower Shops Insurance by State

Looking for the best insurance?

**Get a Quote** 

or call (844) 499-7575

TODAY



















ZIP Code

Find Your Agent >>

#### **Independent Insurance Agents Have More Options**

#### **Business Liability**



Protects your company from the expenses, fees, and other financial losses caused by accidents and other inherent risks of doing business.

#### Workers' Compensation

If an employee were to injure themselves on the job or become ill as a result of the work they do, this can save your company from a significant financial burden.

#### **Commercial Property**



Reimburses you for the value of your business's property, like buildings, equipment, inventory, and even customers' personal property.

#### **Commercial Vehicle**



Covers your business's vehicles, whether that's a specialty vehicle like a catering or a delivery truck or just a regular car used for business.

# **Trusted Choice**

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Collector Cars

Commercial Vehicle

Condo Insurance

Farm Insurance

Home Insurance

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Daycares Flower Shops **Grocery Stores** 

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Insurance by Business Type

Insurance by State

Looking for the best insurance?

Life Insurance

Professional Liability

Renters Insurance

Umbrella Insurance

Workers' Compensation

Small Business

**Get a Quote** 

or call (844) 499-7575

TODAY

















# The best resource for local insurance information

Find an independent insurance agent in your area.

#### Find your state, start saving now.

Our trustedchoice.com state partners are listed below.

Alabama Indiana Alaska lowa Arizona Kansas Arkansas Kentucky California Louisiana Colorado Maine Connecticut Maryland Delaware Massachusetts Florida Michigan Georgia Minnesota Hawaii Mississippi Idaho Missouri Illinois Montana

Nebraska
Nevada
New Hampshire
New Jersey
New Mexico
New York
North Carolina
North Dakota
Ohio
Oklahoma
Oregon
Pennsylvania

Rhode Island

South Dakota
Tennessee
Texas
Utah
Vermont
Virginia
Washington
West Virginia
Wisconsin
Wyoming

South Carolina



**Trusted Choice** 

#### **Most Popular Coverages in Wisconsin**



#### HOME INSURANCE

The coverage you need to protect your home and everything in it.

Read more >>



#### **AUTO INSURANCE**

The right protection for you, your car and others on the road.

Read more >>



#### **BUSINESS INSURANCE**

Broad protection that covers you, your employees, and customers.

Read more >>



#### **WORKER'S COMP**

Valuable employee coverage for work-related injuries and illnesses.

Read more >>

# New TrustedChoice.com Marketing & Resources Page Including the New Market Finder

## **Find a Trusted Choice** insurance agent near you

Find the perfect agent to shop multiple insurance companies on your behalf, saving you time and money

Get Matched, Get a Quote

Or, get matched with an insurance company 3













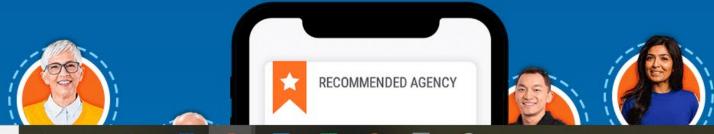


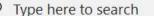
# **Insurance Marketing** For the Independent **Agent Channel**

Increase your digital footprint on the largest marketing platform for independent agents and insurance companies

**For Independent Agents** 

**For Insurance Companies** 

























## **New Marketing & Resources Page**

- Products Supported by TrustedChoice.com
- Resources for Agents and Companies
  - Inspiration Blogs, Podcasts & Newsletters
  - Marketplace Agent & Company Directory, Live Shopper Feed
  - Agent Success Stories
  - Support Help and Agent Login

## Looking for an insurance market? Start here.

At TrustedChoice.com, we know matching. Let us help you find the right insurance carrier, MGA or wholesaler, backed by the power of the IA channel.



#### **TrustedChoice.com Recommended Providers**

























### **New Market Finder**

- Only participating TrustedChoice.com Company partners are presented to agents in the Market Finder
- Available to all agents, not just the 25K+ Trusted Choice agency locations
- Promoted extensively in newsletters and other communications to nearly 90K agents and growing
- SEO strategy being developed to drive agents organically directly to site
- Accessible from the main TrustedChoice.com site
- Coming soon..... Big I Markets where Big I Markets has an appetite
- No additional cost to our current company partners
- DEMO



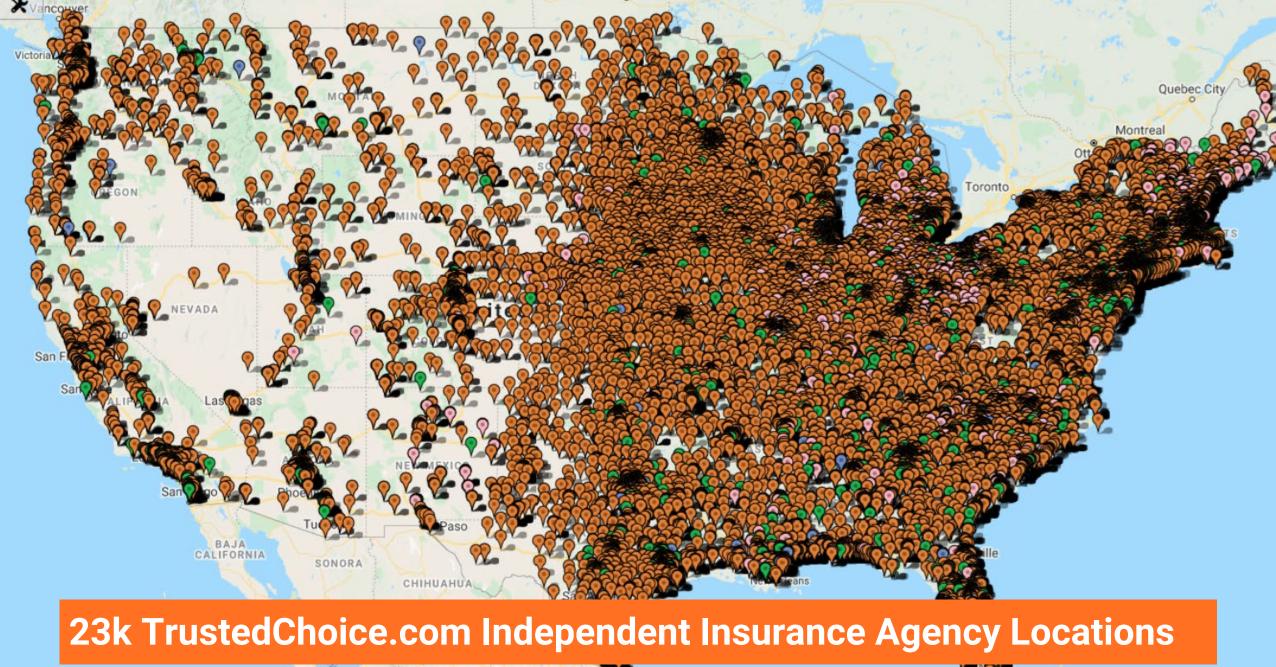
### Advantage Agency Marketing Partnership

Let us help You help Your Best Agents to Send you More of the Business that You Most Want!



# New! IA Leads Distribution Partnership





BAJA SINALOA DURANGO Monterrey





# We Are Now Buying Unwanted Leads from Our Company Partners!

Let me briefly explain "Claim-It" (it's like Uber)

# Trusted Choice.com

j	Years in Business	Business Size	Submitter Name 🔻	City v	State	First Name	Last Name	Email	Phone Number	Claim-It Elig
	4 - 10 years	Sole Proprietor	doriad3			Quinten	Mail Delivery (Current Progressive)	na@na.com	(610) 803-3933	Not Eligible
	Greater than 10 years	Sole Proprietor	wriga15	Yorba Linda	CA	Fernando	Mendez	fernandomendez2295@gmail.com	(858) 395-4919	Eligible
	1 - 3 years	Sole Proprietor	ezzia1	Kathleen	GA	Shanica	Floyd	shanicafloyd@gmail.com	(229) 389-9544	Eligible
	New Business (Less than 1 year)	Sole Proprietor	doriad3	Brookline	NH	TRACEY	DELFINO (Product Liability for Dog toy manufacturing)	traceyedelfino@gmail.com	(774) 269-3834	Eligible
	Greater than 10 years	1 - 5 Employees	vollhk1	Wilmington	NC	Charles	Mccartney	professionaltreeservice1@gmail.com	(910) 465-2377	Eligible
	Greater the 10 cars	Sole Proprettor	ezzia1		NC	Evette	Hughes	ever e_hughe @y hoo.com	(336) 30: 91 2	Eligible
	1-3 yea	S P pretor	o, df		5	leb lca C	sola & als	everue hughe-@ychoo.com	(972 76) 0945	Not Eligible
	New Business (Less than 1 year)	1 - 5 Employees	ritchb4	Hastings	MN	Noah	Brink	nbrinksmasonry@gmail.com	(651) 600-4825	Eligible
	Greater the 10 lears	le Opriet		Cample			nan 4 min	uy f. h ai	(302) 332-5477	Eligible
	Greater than 1 years	sole Proprietor	volline	Brentwood	CA	Monammad	Yousin	nae/na.com	(925) 961-6844	Eligible
	4 - 10 years	1 - 5 Employees	doriad3	Los Angeles	CA	Dave	Call At 10:30 AM Pacific	thetruthbeverage@gmail.com	(213) 758-1717	Eligible
	New Business (Less than 1 year)	1 - 5 Employees	doriad3	Belgrade	MT	Joe	Hauck	na@na.com	(406) 697-9500	Eligible
	1 - 3 years	1 - 5 Employees	ritchb4	Columbus	ОН	Hom	Puri	hsanyashi@gmail.com	(614) 623-9146	Eligible
	Greater than 10 years	11 - 30 Employees	vollhk1	Oakland	CA	Gaffer	Syed	Lakeshore 1901@yahoo.com	(510) 604-1660	Eligible
	New Business (Less than 1 year)	Sole Proprietor	doriad3	Brandywine	MD	Tasheta	Jones	ricardokingsbury@msn.com	(301) 442-0180	Not Eligible
	1 - 3 years	Sole Proprietor	wriga15	Panama City	FL	Andres	Luzio	agluzio@yahoo.com	(310) 227-9635	Eligible



### Why Sell Your Unwanted Leads to TrustedChoice.com

■ We can favor your IAs in the distribution of your leads (if desired);

- □ TrustedChoice.com is a benevolent partner owned by the IA channel
   □ We will pay you more than you are currently receiving for your leads;
   □ We will distribute to more agents and at a lower cost to those agents
   □ We will provide better service to your customers (broader base of the best independent agents);
   □ We will help more IAs; and more of your appointed IAs.
   □ We can make sure your organization gets credit with IAs for each lead shared (if desired);
- ☐ We will share all resolution data with you.



### **Can I Please Start Sending You Money?**

Chip@TrustedChoice.com



#### **Lead Information**

Enter the lead information below to have it added to the TrustedChoice.com Claim-It lead platform.

First Name	Last Name
Email	Phone
Zip Code	
Lines of Business	
<ul> <li>□ General Liability</li> <li>□ Workers Compensation</li> <li>□ Business Owners / Package</li> <li>□ Property</li> <li>□ Umbrella/Excess</li> <li>□ Business Vehicle</li> <li>□ Directors &amp; Officers</li> </ul>	<ul> <li>Employment Practices Liability</li> <li>Cyber Liability</li> <li>Inland Marine</li> <li>Builders Risk</li> <li>Bonds</li> </ul>
Business Description	
Search Business Description	
Current / Expected Annual Premium	Number of Employees
Ψ	Enter 0 for Sole Proprietor
	NW Short Name

Submit lead

### Q & A