

IIABNY Member Benefits Summary

Revenue Producing Coverage for Your Clients

RLI Free Market Access Pays 10% commission *
Personal Umbrella- RLI (stand-alone)
@ Home Business Policy - RLI (stand-alone)
Big "I" Markets*
(Free Market Access- no min volume)
WYO Flood Insurance
Bonds
Boat & Yacht (stand-alone)
Personal Watercraft (jet skis, etc.)
Recreational Vehicle
Habitational
Hospitality
Affluent Personal Lines Package
Non Physicians Med Mal
Private Company D&O
Community Banks
Travelers Wrap +
Real Estate E&O
Claims Adjuster E&O
Financial Services E&O

Coverage for Your Agency

Errors & Omissions Insurance (Multiple Markets)
Employment Practices Liability Insurance
Retirement Services
Medical Insurance
Group Dental Insurance
Group LTD Insurance
Group Term Life Insurance

Research/Technical Issues

Answer Your Unique Questions
Frequently Asked Questions
Posting Decisions and Opinions
Interpreting Coverages
Carrier Contract Review
Technical Papers & Documents

Management Tools

Trusted ChoiceSM Consumer Branding Program
Trusted Premium Funding*
Business Resource Directory
E&O Total Loss Control (TLC)

Member Discount Programs

Staples Discounted Office Supplies*
IIABNY Education Class Member Pricing
ACORD Advantage
Hertz Rental Car
Promotional Products
Caliper Personality Assessments
Agility Recovery Solutions *
FedEx Discounted Services
E-Chx Payroll Solutions

Education Opportunities

Classes Year-Round Throughout the State
Tailored Training
E&O Loss Prevention Seminars
AAI (Accredited Advisor in Insurance)
ACSR (Accredited Customer Service Representative)
Online and Self Study Programs
Virtual University
Best Practices Resources
State Exam Prep

Networking Opportunities

Local Events and Meetings
State and National Conferences
NeXt Generation Insurance Professionals Events
Education Seminars/Workshops

Advocacy & Legislative

State Lobbyist on staff
Federal Lobbyists on staff
IIABNY Capital Event & L-Day
National Legislative Conference
Grassroots Coalition
Insurance Legislation
Carrier Advocacy

Publications for Members

Independent Agent Magazine
Insurance Journal East Magazine
IIABNY Insider
The E&O Report
Capitol Report

Best Practices

To take your agency's performance to another level – to go from good to great -- you will have to continue not only to grow but also continue to improve the job you do for your customers, improve the quality and capabilities of your employees, and provide to your employees the carrier relationships, the tools, the resources and the organization needed to serve your customers. The model is a wheel with strong leadership at the center. The wheel starts with good people having access to the proper suppliers, tools, resources, and organization, thereby attracting more customers, giving the agency better results, allowing the agency to attract better people and clients, producing even better results and so on. Take a look at the Best Practices resources and see how your agency can get started.



[Best Practices Resources](#)

E-Chx Payroll

Delivers tailored payroll solutions - from complete payroll tax preparation and administration to services like real-time internet payroll reporting, and direct deposit - designed to meet the individual needs of every client.

IIABNY Member Benefit:



- Minimum 10% discount on payroll processing fees
- Revenue Share Program - Earn 6% referral fees (minimum of 3 customers)
- Referred customers will receive 10% discount on payroll processing fees
- Ownership of expirations

E-Chx also gives you the ability to write pay as you go workers compensation for your clients with several carriers with low minimum premiums.

Big "I" Advantage Virtual Risk Consultant- Powered by Rough Notes

The Big I Advantage[®] Virtual Risk Consultant powered by Rough Notes ("VRC") is an online sales and service resource designed to help your agency better serve your customers. Using this tool will lead to increased sales by improving your staff's knowledge of a prospect's operation enabling them to better identify and cover customer exposures. The VRC will help your staff better understand the product they sell. It will also assist agency staff with preparing proposals, explaining complicated insurance terms, and most importantly documenting client files. It is truly a tool that will increase the professionalism of staff and help your agency grow while limiting your exposure to E&O claims. Big "I" members have exclusive access to Big I Advantage[®] Virtual Risk Consultant.



Limited VRC Demo
(To see more contact the IIABNY Membership Department)
http://www.roughnotes.com/big_i_demo/index1.html

E&O Total Loss Control



The E&O-TLC (Total Loss Control) program was created by IIABNY to bring innovative and highly-customized E&O loss control resources to IIABNY members and IAAC insureds. From E&O seminars to audit options, reference material, and customized training/consulting programs, we will work with your agency to tailor a program that fits your individual needs.

The E&O TLC Agency Audit Available to all insureds

- Customized agency audit
- Conducted by experienced E&O attorneys of Keidel, Weldon & Cunningham, LLP
- Comprehensive review of the procedures and workflows followed throughout the agency
- Personalized recommendations to reduce the risk of an E&O loss and claim
- 10% premium credit may be available to Westport member insureds*

Customized Training/Consulting

Private Consultation

The partners of Keidel, Weldon & Cunningham, LLP are available for a personal consultation to discuss specific issues affecting your agency. [Contact Us](#)

Private Loss Control Seminars

A private E&O seminar can be specifically customized and presented for your agency. IIABNY can arrange for the seminar to provide for continuing education credits for all licensed seminar attendees. [Contact Us](#)

Free Hot Line

Members can phone IIABNY (800-962-7950) to seek consultation from the law firm of Keidel, Weldon & Cunningham, LLP on non-complex questions. The law firm may be able to answer questions quickly over the telephone. In those cases when an answer cannot be provided in a short time on the phone, the law firm will offer options for further consideration.

Industry Research/Carrier Contract Reviews

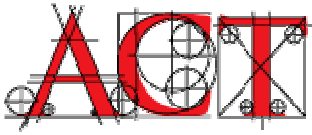
IIABNY prides itself on the depth of its online resource documents. Our library of reference information contains hundreds of white papers, postings of legislative decisions and opinions, sample forms and documents as well as circular letters. Members can call the toll-free hot-line to get answers to industry-related questions. IIABNY's research team handles thousands of technical inquiries each year. Your national membership gives you exclusive access to carrier contract reviews. These contract reviews help members understand what they are being asked to sign. In addition to contract reviews Big "I" Membership gives you access to the Virtual University, where you can ask the expert as well as access an extensive library of insurance, customer service, sales, management and technology articles



Virtual University
<http://www.iiaba.net/VU>

ACT (Agents Council for Technology)

ACT is a part of the Independent Insurance Agents and Brokers of America (IIABA) and provides a candid, action-oriented forum to address the critical workflow and technology issues facing the Independent Agency System. ACT helps participants understand the perspectives of the other stakeholders in the process and provides excellent networking opportunities with the participants who are shaping the future for the industry on these issues.



Sample ACT Article on Improving Commercial Lines Account Marketing
http://na.iaa.org/ACT/downloads/ACT_0909.pdf

IIABNY Essentials for CSR's

The IIABNY Essentials for CSRs is a comprehensive Learning & Development solution for agencies hiring new service staff. Each new hire possesses unique training needs that require a tailored approach. Essentials for CSRs offers hiring managers the tools to identify the learning needs and design the individual development plan to assist with functional job readiness.



Essentials
for CSRs

"Essentials" starts with an in-depth **Knowledge Check** (for IIABNY members only) of both business and insurance technical skills (personal and/or commercial) to assess areas of strength and weakness. It's free, automated and user-friendly.

- The **Knowledge Check** evaluations will be e-mailed to the manager for review by an IIABNY Education Counselor. A copy can be sent to the participant, as well, depending on the manager's preference.
- IIABNY's Education Counselor will personally contact the participant's manager to recommend a **Customized Training Curriculum** addressing both business and technical skills. There is no cost to the agency or participant for this service.
- The Curriculum will match skills needing further development with **workshop offerings** available near your office.
- Six new **Business Skills Training Solutions** have been created to provide essential training for CSRs. Affordable pricing options are available.
- Your customized training plan will also include appropriate **personal or commercial insurance** technical skills recommendations from existing ACSR and IIA offerings. Also included are Word and Excel Training Programs available through the Virtual University.

Tailored Training from IIABNY

Tailored Training brings IIABNY's extensive array of courses to your staff on your terms and in your office. You can choose the courses you want from a list of over 100 programs currently approved for CE, led by professional trainers with years of insurance experience.



from IIABNY

- Property & Casualty courses
- Life courses
- Agency Management
- Designation courses (ACSR, AAI, and AIS)

Or IIABNY can develop a class on a topic of your choice! (Please plan as far in advance as possible allowing at least 3-4 weeks for preparation. A customized class requires additional time.) With the competitive fee structure and fluctuating gas prices, you'll love the savings that attending a class at your own office provides.