

# LEADER



Electronic version available at [BigINY.org/Join](http://BigINY.org/Join)

## Your Agency Has Made a Great Investment in Its Future

Just a reminder that **you are your agency's Key Contact (Company Administrator)**. This means you are our "go-to person" at your agency. We ask that you ensure the entire agency's team is aware of all the benefits available.

You are also asked to keep your company roster and profile up-to-date, which is done quickly and easily in your account (we can walk you through it, if needed). If you feel you're not the right person for this role, please give us a call.

### A Quick Reminder...

- Big I New York staff is always available to talk through the amazing aspects of your Big I New York membership! This includes finding things on our website, products and services, education programs, and more. Please don't hesitate to reach out to us.
- Our membership year runs September 1<sup>st</sup> - August 31<sup>st</sup>. Your yearly invoice will arrive in early August and can be paid online at [BigINY.org/Dues](http://BigINY.org/Dues) or by mail or fax.
- We are a member-driven association. Every spring you are given the opportunity to participate in our proxy vote in which the next slate of executive committee members and board of directors is elected.

- Your agency is also a member of our national association (IIABA or the Big "I"), which grants you additional benefits on a national level. If your agency is in an area with a local association, you're also a member of that and should be receiving separate information about local upcoming events and meetings directly from them.

Your Big I New York membership gives **EVERYONE** in your agency access to our extensive and exclusive member products and benefits. This includes the vast resources on our website, market programs, **Trusted Choice®** resources and materials, access to **Catalyit** technology resources, new hire training options, discounted education pricing, CE history tracking, and more.

### Discounts

Access to and savings on exclusive member programs such as:

- Tailored payroll solution (**Heartland Payroll**)
- Industry-specific HR consulting (**The Workplace Advisors**)
- Remote staffing (**WAHVE – Work-At-Home-Vintage-Experts**)
- Endorsed online payment provider (**ePayPolicy**)



# LOGIN

## Make My Big I New York Your Big I New York

Your **Big I New York** account lets you register for Big I New York education classes and webinars online, review your CE history (including your employees' history), print your CE certificates, manage your contact information, pay your membership dues, and access the "members only" content on our website. This is also where key contacts will maintain your staff roster, update company information, and add/delete/modify branch information. But first, the basics...

### Log into Big I New York Website ([BigINY.org](https://BigINY.org))

- Go to BigINY.org; click "Sign In" in the top right corner
- Enter your username and password

### Not Sure of Your Password?

- Go to BigINY.org; click "Sign In" in the top right corner
- Click "Forgot Your Password?" (below the fields)
- Enter your email address and your password will be sent to you

### How to Change Your Password

#### Individual Users

- Sign in to BigINY.org
- Once logged in, click on your name in the upper right hand corner, click "My Member Profile", then click "Password"
- Follow prompts to enter your new password twice then click "Reset Password"

#### Company Administrators

- Sign in to BigINY.org
- Once logged in, you must select the user's password you want to change, follow the prompts to enter the new password twice, then click "Reset Password"

### Create New Accounts

Each employee needs their own account. We can take care of it for you (email [team@biginy.org](mailto:team@biginy.org)) or you can do it yourself in your account:

- Sign in to BigINY.org and click "Account Login"
- Click "Company Roster"
- Click "Add Employee to Roster" then follow the prompts

### Assign Additional Company Administrators

To allow another employee to maintain your company info, pay dues, and/or vote then you'll need to make them a company administrator.

- Click "Company Roster" then "Manage Company Admins"
- Find that person's name and click "Add"

The Big I New York website is your first go-to for information and news but there are other ways you can stay connected.

Our e-newsletters will provide you with the latest need-to-knows. Our social channels are a great way to engage with other members, be notified on our latest advocacy efforts, see upcoming events/event recaps, and much more.



@BigINewYork





# USE

## Are You Taking Advantage of All That's Available?

We are proud that we offer such a wide array of products and services (the Benefits Index gives a high-level overview). **Plus there are all of the things that we do behind the scenes, like our tremendous legislative and carrier advocacy work.** However, we realize it can all be overwhelming! Start by looking at your own agency. Where could you use some help?

### Answer Center

Have a questions or need assistance? We've done the research for you! Our online Answer Center provides helpful resources, frequently asked questions, regulations and legal opinions, and much more. Plus our in-house "insurance geek", **Tim Dodge**, is just a phone call (315-432-4229) or e-mail (tdodge@biginy.org) away if you need more help.

### Consulting Services- Insurance Technical Coverage Issues and Operational Services

Running an independent insurance agency is difficult work. It's easy to feel like you are on an island by yourself, trying to handle management, operations, HR, training, sales, and strategic planning. You are not alone! We are here to help and support our members, offering hands-on consulting services. We excel beyond other insurance associations by providing one-on-one consultative services with our experienced team.

### Training, Education Discounts & CE Tracking

Do you have new hires or internal promotions? Our online, on-demand **New Hire Training** features audiovisual exercises and knowledge checks creating an interactive learning experience that is cost-effective and measurable. We also offer in-house **Tailored Training** options as a complement to our award-winning education classes and webinars (which are both discounted for members) as well as **CE tracking**. Do you have a future leader in your agency but don't have the time and resources to help them reach their full potential? That's where **Big I New York Leadership Academy** comes in. We've put together a top-notch team of expert coaches to guide and train team members to give them the tools and skills they need to be a successful agency leader. Do you have an employee ready to take their career to the next level? We offer pre-licensing classes to get them started today!

### Hiring

Big I New York's partnership with **The Workplace Advisors** provides our members with expert HR support tools, customized to meet the unique needs of your business. From an HR Support Plan to consulting engagements for recruiting, HR compliance, compensation, and employee engagement, The Workplace Advisors is here to help. Enjoy exclusive member pricing! **WAHVE** is an endorsed, cost-saving remote staffing solution and **Big "I" Hires/Ideal Traits** offers hiring support.

### Reducing Costs and/or Increasing Revenues

Our members earned **more than \$1.2 million** in commissions on our exclusive market access programs: a stand-alone **Personal Umbrella Policy**, mono-line **Work Comp Program**, **Write-Your-Own Flood Program**, **Independent Market Solutions Access Markets- Commercial & Personal Lines** (may qualify for profit sharing), and **Big "I" Markets Commercial & Personal Lines** programs. Exclusive member programs are also available in everything from tailored payroll services to premium finance, HR consulting, remote staffing, and much more.

### Catalyit – They Make Understanding Insurance Tech Easy

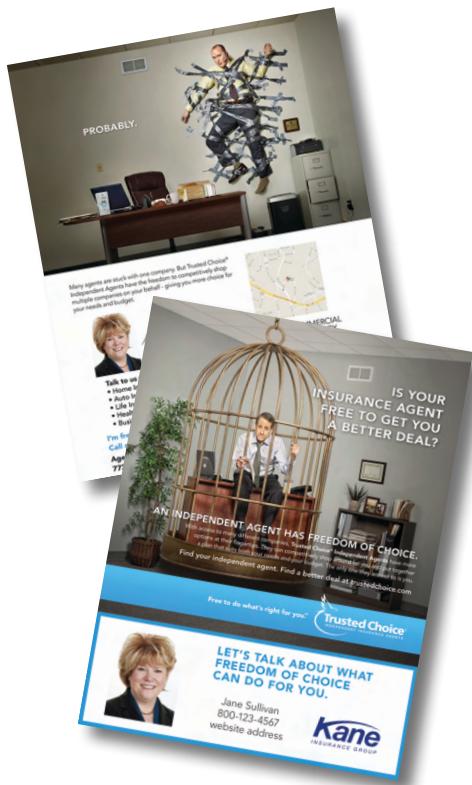
Many insurance agencies struggle to understand, select, and implement technology, leading to productivity bottlenecks that limit growth and profitability. Catalyit offers side-by-side comparisons and guidance on modern, efficient, and cost-effective solutions. You have free Full Access to [Catalyit.com](http://Catalyit.com) included in your Big I NY membership.



# MARKETING

## TrustedChoice.com/Agents

Trusted Choice® is the national marketing brand and offers a hub of resources created exclusively for Big I members to help independent agents promote their agencies.



### Optimize Your Digital Presence

#### Free Marketing Materials & Training

A suite of professionally produced advertising materials (postcards, direct mail, print ads, digital banner ads), social media graphics, blog posts, infographics, email blast articles, and more.

Training programs to sharpen your knowledge in areas like advertising, work-flow automation, and social media are also available.

#### Social Media Resources

Create, customize, and schedule Facebook, Instagram, X, and LinkedIn posts for the entire year with **Social Jazz** and receive a member exclusive price. Other tools like the Agency Social Media Guide and the content calendar help agencies like yours elevate your marketing strategy with effective tips and tools.

#### Google Business Profile Optimization Guide

#### AI Marketing Toolkit

#### Hard Market Toolkit

#### Website Performance Review (Digital Performance Hub)

### & Get Money Back!

#### Marketing Reimbursement Program (MRP)

Trusted Choice will reimburse a portion of expenses incurred in 2025 by Big "I" members for services from vendors listed on TechCompare ([techcompare.independentagent.com](http://techcompare.independentagent.com)), digital marketing efforts, and marketing education.

#### Reimbursement Allotment

All agencies are eligible for up to \$1,000 in reimbursement.

Reimbursement amount is calculated at 50% of cost to member agency with a maximum reimbursement of \$1,000 (limited to one location).



# ASK

Our goal is simple: To help you in any way we can!

## EXECUTIVE



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## Not sure who to contact?

Try one of our general emails:  
[team@biginy.org](mailto:team@biginy.org) | [edu@biginy.org](mailto:edu@biginy.org) | [iaac@biginy.org](mailto:iaac@biginy.org)



# BENEFITS INDEX

## Information

Technical Answer Center - ext. 229  
Best Practices - ext. 218  
Government Affairs - ext. 212  
Carrier Relations & Contracts - ext. 218

News & E-Communications - ext. 224  
Membership Billing Questions - ext. 119  
Website Login Help - ext. 210

## Products & Tools

### INSURANCE FOR YOUR AGENCY

Errors & Omissions - ext. 233  
Cyber Liability - ext. 233  
Employee Benefits (Dental, Vision, Life & Disability) -  
LiDAC Broker Employee Benefits Exchange (516) 482-2696  
Employment Practices Liability Insurance - ext. 233  
Retirement - (703) 706-5466

### OPERATIONS - ext. 231

Agency Focus  
Agency valuation operations planning  
Big "I" Hires/Ideal Traits  
Hiring Support  
Caliper  
Personality assessment and job matching tool  
Catalyt  
Agency technology guidance | [Catalyt.com](http://Catalyt.com)  
ePayPolicy  
Endorsed online payment provider  
Heartland Payroll  
Endorsed "Insurance Friendly" payroll provider solution  
Imperial Premium Financing Services (IPFS)  
Endorsed premium financing company  
WAHVE  
Endorsed cost-saving remote staffing solution  
The Workplace Advisors  
Endorsed human resource consulting firm

### E&O TOOLS AND RESOURCES - ext. 247

Customized Training / Consulting  
E&O Loss Control Seminars  
E&O TLC Agency Audit  
Forms, checklists, sample letters, disclaimers, and tools  
The E&O Report

### MARKETING & TRUSTED CHOICE® - ext. 231

Trusted Choice® will reimburse a portion of expenses for digital marketing efforts, marketing education, and services from vendors listed on TechCompare. Reimbursement amount is calculated at 50% of cost to member agency with a maximum reimbursement of \$1,000.

Free marketing materials and training  
Ad customization  
Social media training and resources  
Google Review guidance  
Hard market and AI toolkit  
Website performance review (Digital Performance Hub)

## Market Access

### Personal Umbrella Policies and Home Business Insurance

Agencies whose name starts with A - F: ext. 243  
Agencies whose name starts with G - N: ext. 221  
Agencies whose name starts with O - Z and the Virgin Islands: ext. 246

### Independent Market Solutions (IMSAccess.org) - ext. 233

More added frequently

**Carriers:** Attune, Chubb, CNA Surety, Coterie, Foremost Signature Home & Auto, JIBNA, Progressive, Prudent Pet, RMS Hospitality Group, Semsee, Travelers.

### Big "I" Alliance Blue - ext. 231

Personal Lines & Commercial Lines programs available.

## Education & Events

In-House Training Options - ext. 215  
Classroom & Webinar Offerings (incl. Pre-licensing) - ext. 119  
New Hire Training - ext. 119  
Leadership Academy - ext. 226  
Local, Statewide & National Events - ext. 249  
Accessing Your Big I New York CE History - ext. 119

## Interact & Engage

NextGen - ext. 249  
Invest - ext. 226  
Local Associations - ext. 218  
Volunteer Opportunities - ext. 218  
State & National PACs - ext. 212

