Running your agency without the right support and access to tools can be exhausting.

We're here to help.

As a Big I NY Member, your membership empowers, connects, and equips you to serve your clients and grow.

With over 100 years of experience and a strong record of support, our trade association has served thousands of independent agents in New York with access to knowledge, markets, tools, tech know-how, and advocacy.

BIG I | NEW YORK

WE HAVE YOUR BACK

BigINY.org

BENEFITS CHECKLIST

What does your Big I NY Membership get YOU?
What tools can help your agency? Here are just a few ways we can help.

Check the solutions you need and let's talk!

PEOPLE MANAGEMENT & DEVELOPMENT

Training & Development

- ☐ With **in-house education**, Big I NY can bring NY-approved classes to your team. High-quality convenient, and with a focus on areas you choose. Help your team meet CE requirements, and while you potentially reduce costs.
- ☐ Access to **NY classes and webinars**.
- ☐ Offering virtual **P&C Pre-licensing** courses 3x/year in NY – high pass rate and extra support for students who need it.
- ☐ **New Hire Training** teaches insurance basics to your new hires and business skills to the current team: personal lines, commercial lines, employee benefits, and customer service. The **MyAgencyCampus** program is fantastic, engaging, and uses a modern training platform. **Have a demo emailed to you to see it in action.**
- ☐ **Risk Solutions IQ** – a 10-week, online training program for Commercial Lines Producers and Account Executives.
- ☐ **Agency Compensation** – Members now have access to participate in Agency Compensation 360. This is the first comprehensive, multi-state compensation & benefits survey with user-friendly, interactive dashboards designed to give independent agencies a clear view into compensation, benefits, and outsourcing across the industry.

- ☐ **Right Start Training Program** – An Agency Toolkit to Grow Your Business and Gain Appointments. Attendees will gain knowledge on operational effectiveness, employee productivity, and goal setting. **Free with membership and available online 24/7.**
- ☐ **Leadership Academy** focuses on building a foundation of self-leadership, championship culture, and vision. Participants will identify their strengths, address growth areas, and learn practical tools to lead with confidence and clarity.
- ☐ **NextGen** is a group of young insurance professionals coming together to network, develop skills, and give back to our communities.
- ☐ **Hiring Assistance** – Big I NY offers **IdealTraits**/**Big "I" Hires** for hiring with many satisfied NY members using it.
- ☐ **WAHVE (Work at Home Experts)** – WAHVE matches you with contract employees who have insurance agency experience and agency management system knowledge. **Benefits include:** No overhead expenses, pay a set hourly rate for hours worked, and access to a large talent pool of *highly qualified*, *trained*, *experienced* insurance industry professionals. You could save around **40-50%** on staff costs and overhead.
- ☐ **Human Resources** – We have partnered with the **Workplace Advisors** to help our members with all their HR needs. Get a discounted subscription to their *HR Support* plan which includes a custom employee handbook.

RESOURCES TO HELP YOUR AGENCY

- ☐ **NYS Cyber Regulation Compliance Assistance**
  - NYS Cyber Resource Step by Step Guide
  - Remember to file your **NYS DFS Certification of Compliance** *yearly by April 15th* by visiting the DFS Portal
- ☐ Mandatory **Sexual Harassment Prevention**
- ☐ **Commercial Producer Onboarding Guide** – This guide is for both newly licensed producers, new hires who may not have the commercial lines background level of your current staff, and producers who want to refresh their commercial lines coverage skills.
- ☐ **Policy & Procedures Manual**
- ☐ **Big Book of Form Letters** & Other E&O Tools
- ☐ **The Hard Market Toolkit & Supporting Resources** – Provides great information, talking points, template emails, and more to help your team communicate with clients about the hard market. The Hard Market Toolkit provides sales and communication tools, renewal forms, and more.
- ☐ **5 Minute E&O Fixes, Tips, Tricks, and Tiny Tweaks** to share with your staff.
- ☐ Our **Answer Center** has frequently asked questions and our research-based answers. This self-service resource covers 20+ key topics; an exclusive member-only resource.
- ☐ **Legal System Abuse Toolkit** – Frivolous lawsuits and inflated claims are adding billions to insurance costs - and most consumers don't know it. This resource gives you simple ways to educate clients, explain rising costs, and advocate for common-sense legal reforms; helping protect both your customers and your business.
- ☐ **Industry Intel** – Stay informed with exclusive industry insights and benchmarking tools, like the **NY P&C Insurance Marketplace Report**, **Catalyit Tech Stack Report**, **Best Practices Study**, and **Agency Universe Study**—providing valuable data on market trends, agency performance, technology usage, and the evolving independent agency system.

TECHNOLOGY & CONSULTING

- ☐ **Technology Guidance** – **Members have a free, full access subscription to Catalyit**. Reaching your agency's full potential requires using the right technology. Catalyit can help with that by helping create a custom map for your technology plan, providing guidance and connecting you with the right solution providers. It is an incredible resource available to your entire team.
- ☐ **Operational & Technical Consulting** – Whether you need an E&O website review, a virtual E&O audit from a Swiss Re approved Auditor, an operational agency evaluation, help adopting new technology or updating your workflows and procedures, we have your back! Need help with a complex claim situation? Trying to compare different policies? Trying to figure out whether a policy meets your client's insurance requirements for subcontractors? We can help with that too. Start with our assessment.
- ☐ **Agency Valuation** – Our partner **AgencyFocus** offers members a free 30-minute consultation. This discussion will review the agency's needs, provide advice and resources focused on business planning, agency operations, and compensation strategy. You'll get one-on-one time with one of the industry's leading experts on data, valuation, and perpetuation planning.
- ☐ **Strategic Planning** – Our team will work with your agency on strategic planning: strategic plan, vision, goals, and action plans; strengthening culture, enhancing leadership skills, organizational consistency, accountability modeling and partnering for profitable growth.
- ☐ **Cybersecurity Training** – There are a few options to consider: If you are an ELANY member, you have free cybersecurity training through **KnowBe4** (our team uses this). **Catalyit** also lists many other great options.
- ☐ **ADA & Accessibility** – Is your website ADA compliant? ADA and accessibility resources are available.

INSURANCE PROGRAMS

- ☐ **E&O Insurance** – With our IAAC team, you'll gain an incredible advocate, deep-knowledge, and top-tier customer service. Everything you want in an agency. You also gain access to the E&O Hotline powered by Howard Kronberg of Kaufman Dolowich. We would love the opportunity to review your E&O program. We insure many of our members and have earned extensive experience over the 50+ years we've represented them. Access to multiple markets; both admitted and non-admitted.
- ☐ **Cyber/Privacy Liability** – We have multiple options to protect your agency.
- ☐ **Personal Umbrella - RLI/Hudson Products** – Unsupported Personal Umbrella; RLI & Hudson products available. A few things to highlight:
  - Fantastic customer service from our team; opportunity to build a relationships with our underwriters
  - Competitive commission on new and renewal business
  - Online rating access
  - No minimum volume requirements or access fees
- ☐ **Independent Market Solutions (IMS)** facilitates relationships between agents who are unable to secure direct company appointments due to any number of reasons and carriers with an appetite for writing coverage. Access to IMS is available at no charge to Big I NY members. Annual New Business production commitment is required for consideration. Also includes free acess to Semsee, an online quoting platform for small commercial insurance.

  *Also, when you need a niche market or just have one-off policies, **Alliance Blue** is a great option.
- ☐ **Workers Compensation** - We partnered with PMC Insurance Group (a subsidiary of ONE80 Intermediaries) to provide mono-line work comp solutions for our members. They have several unique programs and specialize in hard-to-place risks and great risk management services.

MARKETING

- ☐ **Trusted Choice** offers resources to help members effectively market in a digital world. Plus, they offer reimbursement money to offset some of the digital marketing tools and training you use. With a TC Digital Performance review, you'll learn how your website is performing, and tips for improvement. You can access free content to share on your digital channels, deeply discounted access to a social media posting platform and ready-to-use marketing campaigns that can be customized for your agency.
  - **NEW** Update your agency logo in our **Agency Logo Hub** with a quick expert review of your current logo, or improve its quality with our logo optimization services. Full design services, including a brand evaluation, custom logo design services, and much more, are also available for a fee. Also, access their free **PR Toolkit** with ready-to-use tools that simplify pitching, improve communication, and help you confidently represent your agency in the media.
- ☐ **AI Marketing Toolkit** – Discover how to leverage AI tools to keep your agency ahead in the fast-changing insurance landscape.

EVENTS

- ☐ **Go Big 2027** – May 11th-12th at the Long Island Marriott in Uniondale, NY.
- ☐ **Women in Insurance Summit** – Fall 2027 at TBD.
- ☐ **Grassroots Advocacy** – Take part in legislative advocacy through our **Group of 100 (G100)**, Public Policy Round Table, legislative meetings, and other exclusive events.

QUESTIONS?

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