



BIG **i** SM



2025 TRUSTED CHOICE UPDATE AND IDEA EXCHANGE



**TRUSTED CHOICE PROVIDES BIG "I" MEMBERS
WITH FREE MARKETING RESOURCES**



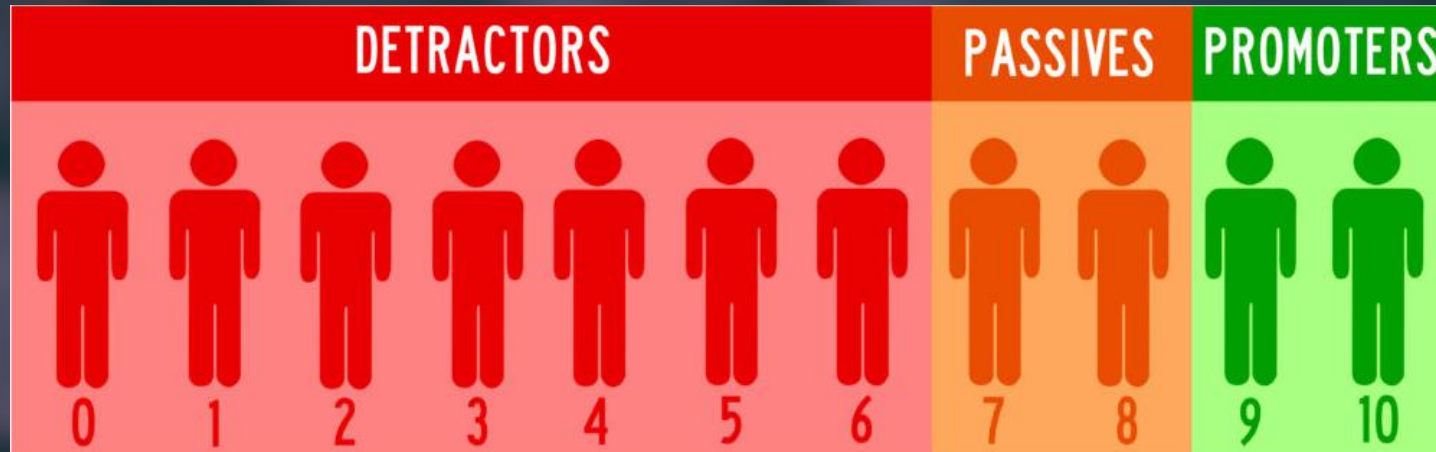
MY EXPERIENCE WITH TRUSTED CHOICE HAS BEEN GREAT. THE CUSTOM GRAPHICS AND WEB DOMAIN ANALYSIS WERE REALLY HELPFUL. EVERYTHING I'VE ACCESSED (E.G., TOOLKITS, TEMPLATES, ARTICLES) HAVE BEEN CLEAR AND EASY TO INTEGRATE. THE CANVA TEMPLATES ARE VERY CONVENIENT, ALONG WITH THE SOCIAL MEDIA CALENDARS.

Stevi Sanderowitz
SterlingRisk Ins, NY

Sept 2025



NPS Scores Remain High



Q1
79

Q2
76

Q3
73

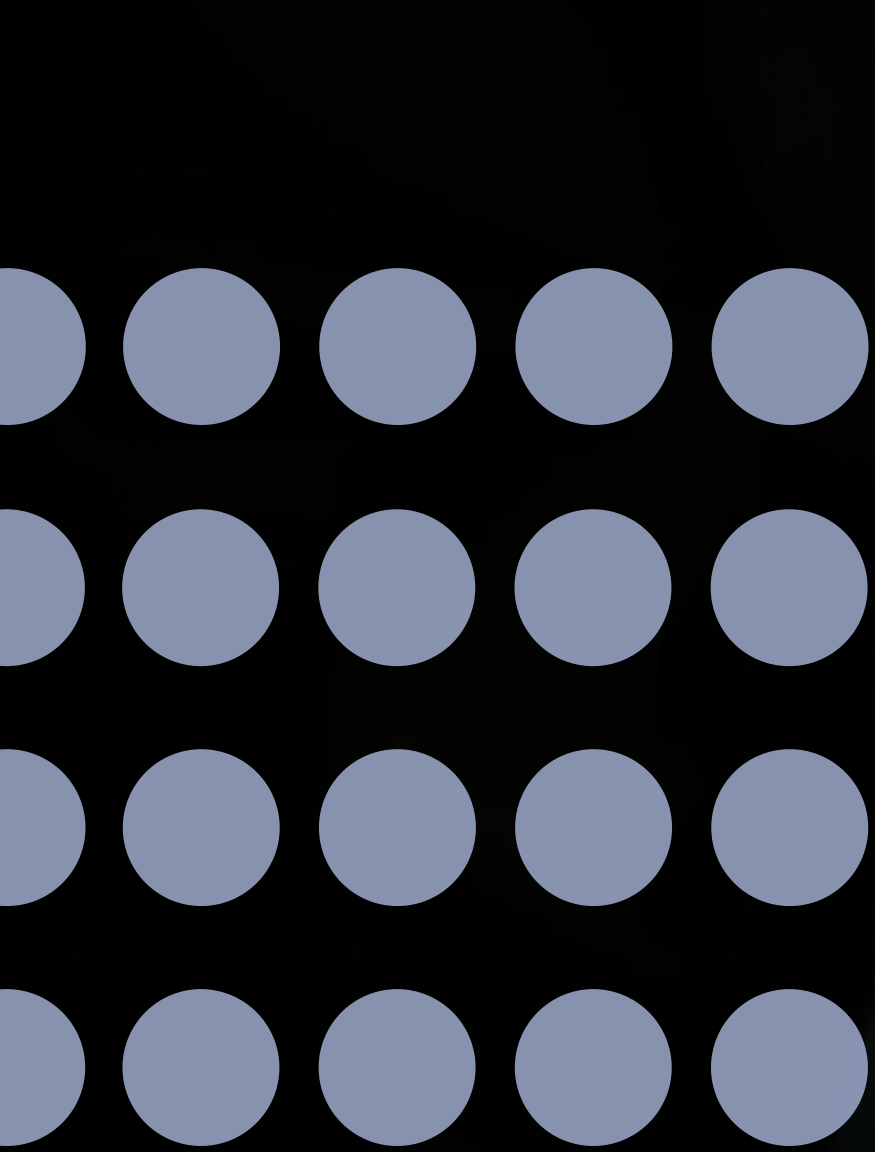
Q4
75

(Target)



2025 PROGRAM HIGHLIGHTS





SOCIAL MEDIA RESOURCES





12k
graphics accessed

SEPTEMBER 2020

T	W	Th	F	S
<u>Holiday</u> NATIONAL LIFE INSURANCE AWARENESS MONTH	<u>3 Holiday</u> National Preparedness Month	<u>4 Fall</u> FALL CAR MAINTENANCE CHECKLIST	<u>5 Pet Insurance</u> What does Pet Insurance Cover?	<u>6</u>
<u>Life Insurance</u> Top Reasons People Buy Life Insurance	<u>10 Business</u> A Business Inventory That Requires an Insurance Policy	<u>11 Holiday</u> American Red Cross	<u>12 Home</u> Why Do I Need Homeowners Insurance?	<u>13</u>
<u>Life Insurance</u> What is Life Insurance?	<u>17 Auto Safety</u> Checklist for the Road in 2021	<u>18</u>	<u>19 Fall</u> TAILGATING	<u>20</u>
<u>Holiday</u> ROSH HASHANA	<u>24</u> What are Affordable?	<u>Are there Different Types of Life Insurance?</u>	<u>WORRIED ABOUT A TREE FALLING ON YOUR HOUSE?</u>	<u>27</u>
<u>Home</u> WHAT DOES A HOMEOWNER'S POLICY COVER?				

7k
calendar downloads

www.trustedchoice.independentagent.com

Set Your Social Media to **Autopilot**



70% conversion rate

Free trial to paid subscriber

Top opt-in email of 2025:
61% open rate



169
customers

The infographic features four overlapping circles of different colors (dark blue, blue, orange, and dark blue) containing white text. The circles are arranged in a cluster. The background is a blurred image of a laptop screen displaying a dashboard with various charts and data points. The text is bold and easy to read.

8,400
monthly posts

156K
monthly views

3,500
monthly likes,
comments and
shares

Essentials

- ### Business Insurance

- ### Insurance

- ### Insurance Basics

- ### Personal Insurance

- ### Safety & Disaster

- ⊕ ⊖

- ### Seasonal Topics

- ### Specialty Insurance

- ### Trusted Choice

- ### Vehicle Insurance

- ☒ ATV
- ☒ Auto
- ☒ Boat
- ☒ Distracted Driving
- ☒ Motorcycle
- ☒ RV
- ☒ Snowmobile

Here's What Independent Agents Are Saying About

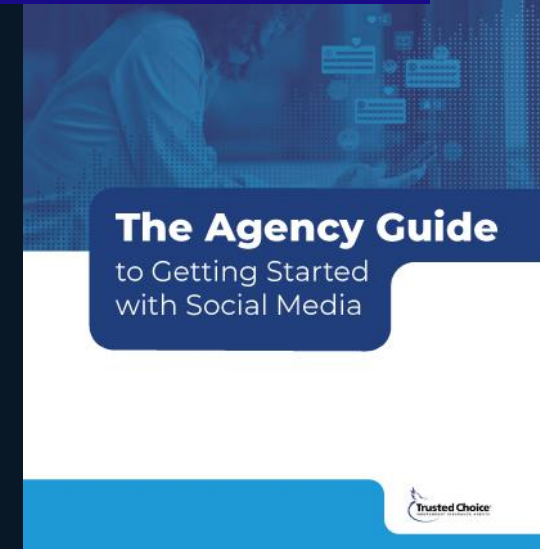




TOOLKITS & GUIDES

2,083

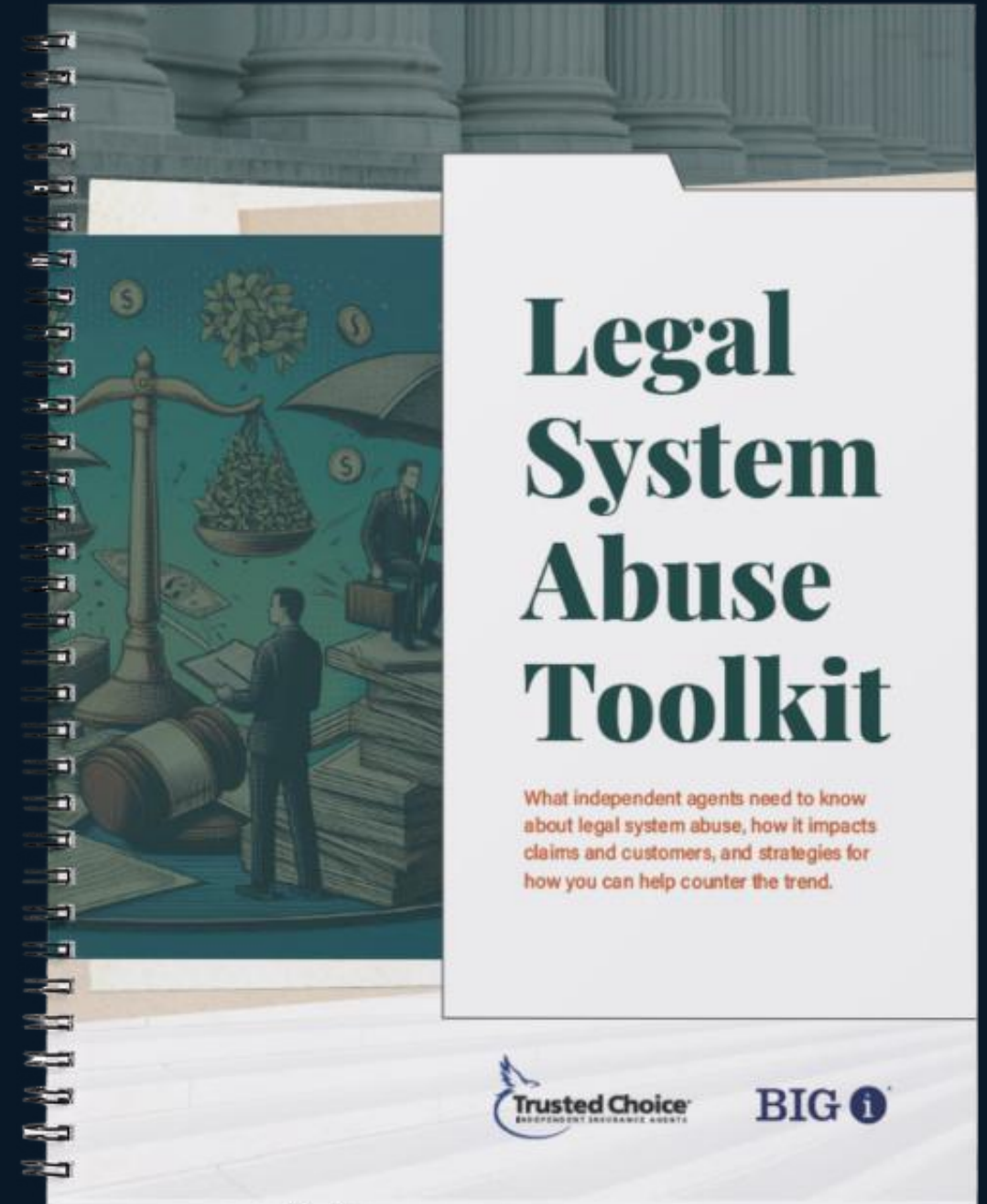
toolkit downloads in 2025



Legal System Abuse Toolkit

1,560

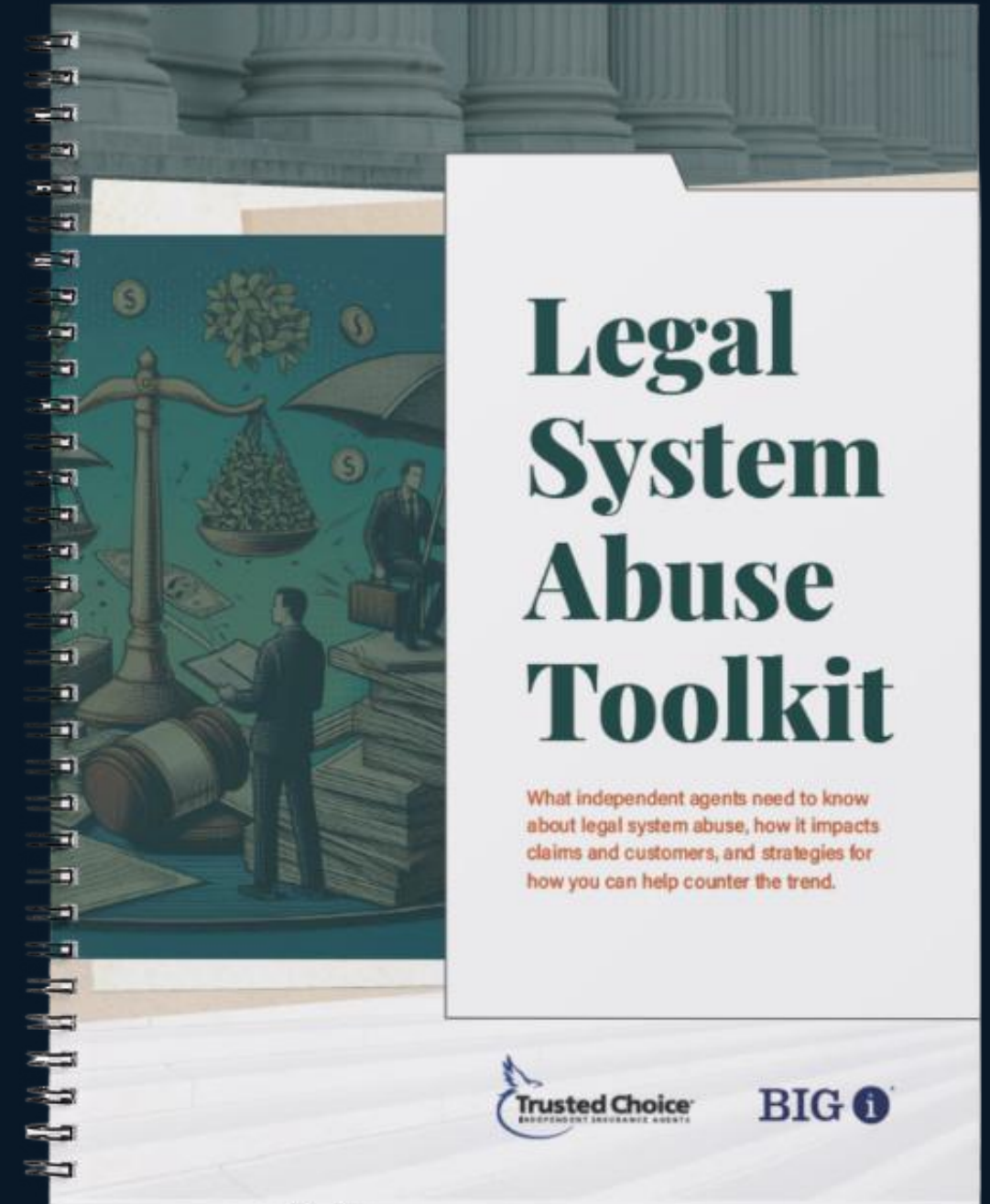
Downloads



Released June 2025

Legal System Abuse Toolkit

- Financial impacts
- How the plaintiff side operates
- How to combat
- Client talking points



Released June 2025



MARKETING CAMPAIGNS

Legal System Abuse Toolkit

Supporting Materials

**Legal System Abuse
drives up the cost of
your insurance:**



\$5,135

average increase in
insurance costs for
an American family

Source: Perryman Group Study



LEGAL SYSTEM ABUSE:

a term describing
tactics that increase
the cost, frequency,
and size of liability
settlements, which
has significant
impacts beyond
the courthouse.



\$366.8 Billion
amount of financial
liability incurred by
businesses in 2024



Source: 2024 study by Institute for Legal Reform

Legal System Abuse Toolkit

Supporting Materials

BIG 

The Shadowy Force Behind Rising Insurance



Legal System Abuse Toolkit

Supporting Materials



Legal System Abuse Podcast

**Will be
distributed to
60k+ members
next month**

Recorded 10/29



**John Barbour
CEO, IIAG**



**Nathan Riedel
SVP Govt Affairs,
IIABA**



**Jeff Beck
SVP Govt Affairs,
Selective**

Top Campaign: "Insurance Explained"

Expanded to now feature 39 videos

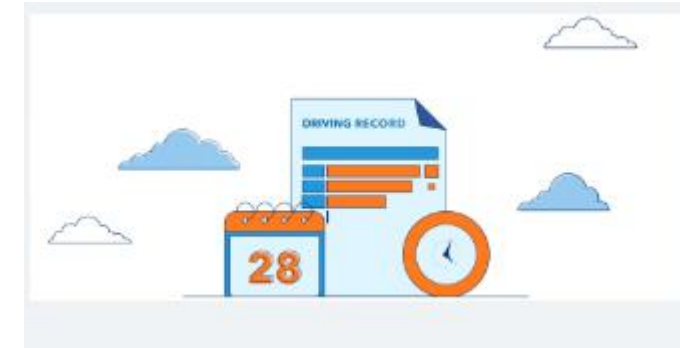
2500+ videos requested



Hard Market



AirBnB



Personal vs Commercial Auto



D&O Insurance



Professional Liability



Renters Insurance

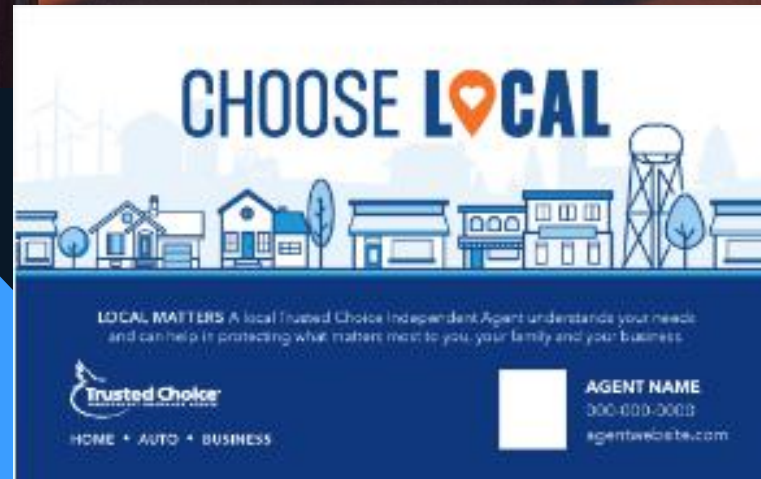
Big (or Direct) Insurance Companies vs. Local

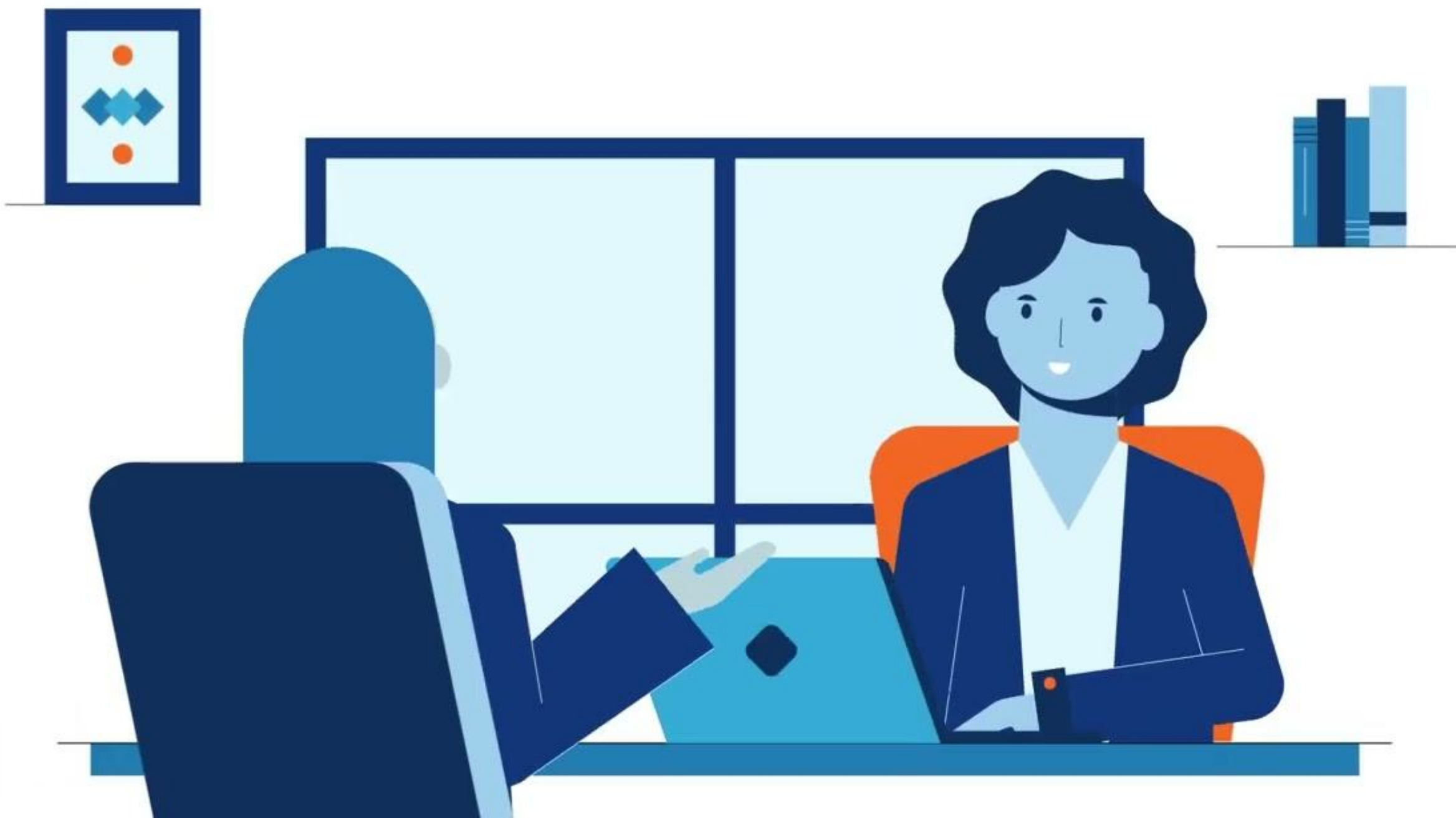


"Choose Local" Campaign

- Free Window Cling
- Print Ads
- Digital Ads
- Social Graphics

Used by 350+
agencies





Digital Performance Hub

1,700+
users in 2025

Site Review

www.insurancesite.com

Latest Report: June 6, 2024

DOWNLOAD PDF

Report Score

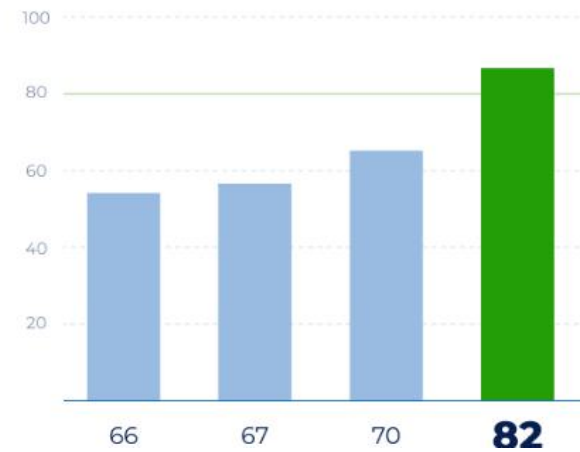


+12 From Last Report 🔥

Report Highlights

Performance Over Time

Last 4 Reports



Mobile Friendliness



This webpage is super optimized for Mobile Visitors.



Wavelength
Range



Additional Member Engagements

We encourage
carrier
participation!

Webinars

6

webinars

790

registrants

Top webinar:
Social Media Ads for
Independent Agents: How to
Generate Leads & Gain a
Competitive Edge



Trusted Choice Blog

15

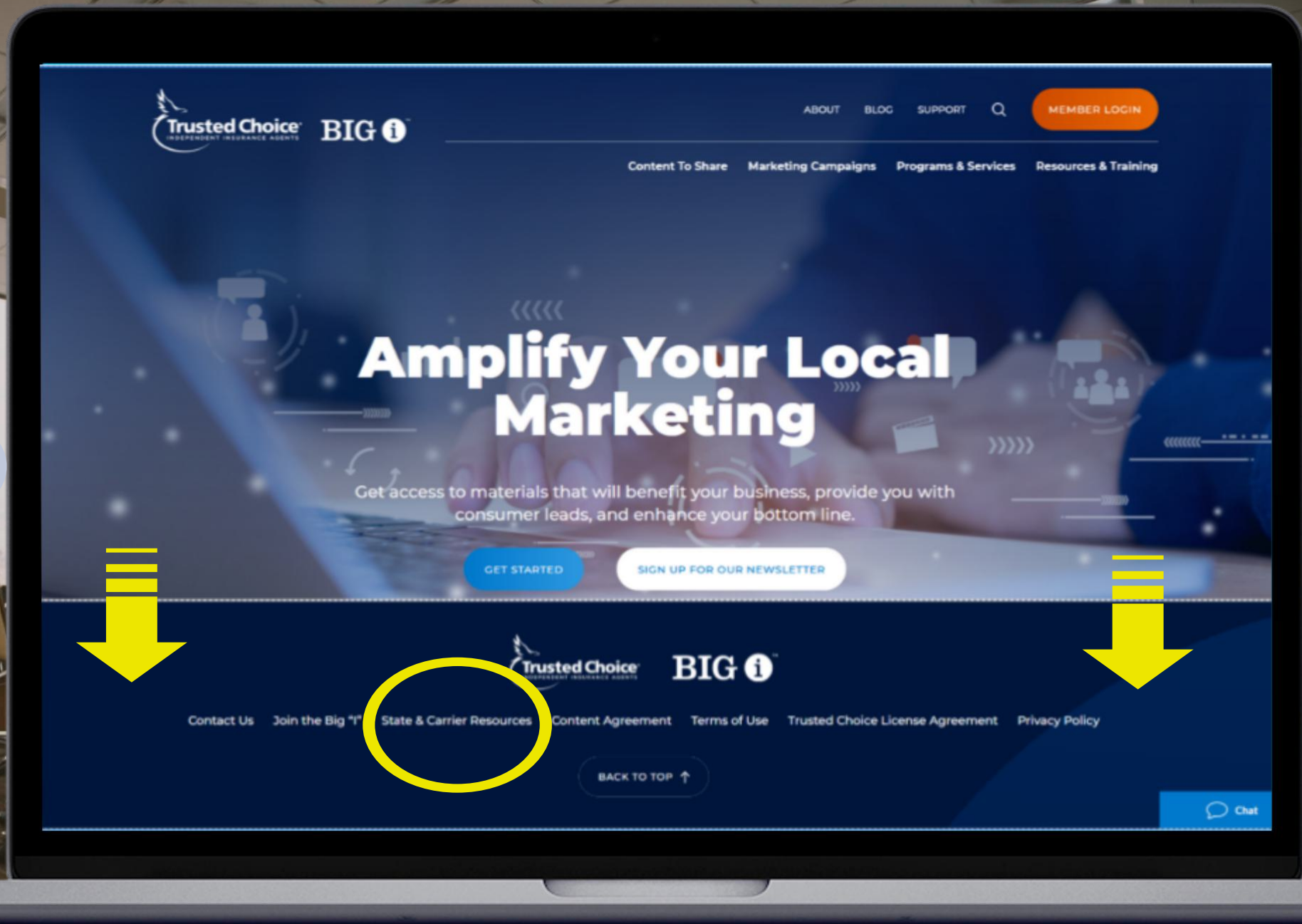
blog posts (YTD)

4700

views

Top blog:
Retention and Remarketing
in a Challenging Market

Connecting Agents with Our Resources



State & Carrier Resources

This page is for carrier and state staff to access agent facing marketing materials that can support Trusted Choice resource promotion. We can create custom flyers, graphics, or videos. If you don't see what you are looking or would like to schedule a webinar for your agents/members please contact Joseph.Cox@iiaba.net

Newest Promo Materials

Find our newest videos, flyers, magazine ads, social graphics and more for top programs currently being promoted by Trusted Choice.



Digital Performance Hub

Formerly the Digital Review, now elevated into a more user-friendly dashboard experience.

[VIEW NOW](#)



Social Jazz

Social media automation tool that will generate a 12-month social media calendar in just minutes with little hassle for agents.

[VIEW NOW](#)



Hard Market Toolkit Expansion

A toolkit created to help agents navigate the current hard market. Includes latest updates on market trends, economic indicators, and strategic insights.

[VIEW NOW](#)

All items can be updated with your company branding and colors

- Flyers
- Social Media Graphics
- Email and Newsletter Copy
- Video
- Banner Graphics



[ABOUT](#) [LOGOS](#) [BLOG](#) [SUPPORT](#) [PROFILE](#) [LOGOUT](#) [Q](#)

[ACCESS YOUR DIGITAL PERFORMANCE HUB](#)

[Content To Share](#) [Marketing Campaigns](#) [Programs & Services](#) [Resources & Training](#)



Berkley
Mid-Atlantic
Insurance Group
| a Berkley Company

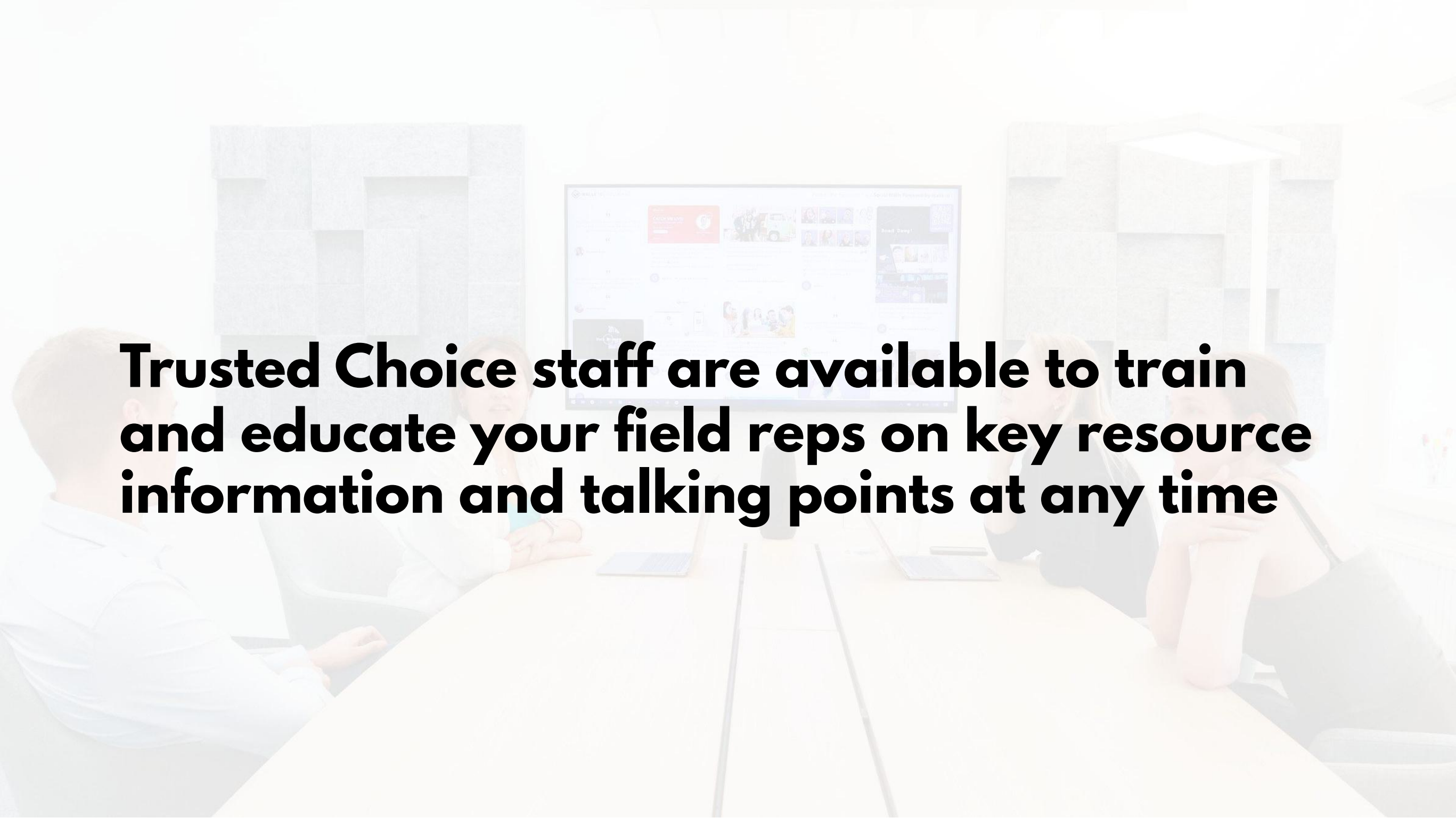


Berkley Mid-Atlantic Partner Page

Berkley Mid-Atlantic is partnering with Trusted Choice® to help you confidently transform your agency's digital presence and stay current in an ever-changing industry. It's just part of our commitment to support you as we help you change the way you work, stand out and grow your business.

[Digital Review of Your Website](#)

**Branded landing
pages available by
request**

A group of people are seated around a long wooden table in a modern meeting room. In the background, a large screen displays a website with various images and text. The room has a contemporary design with grey acoustic panels on the wall. The text is overlaid in the center of the image.

Trusted Choice staff are available to train and educate your field reps on key resource information and talking points at any time

Thank You for Your Support





Strategic Focus

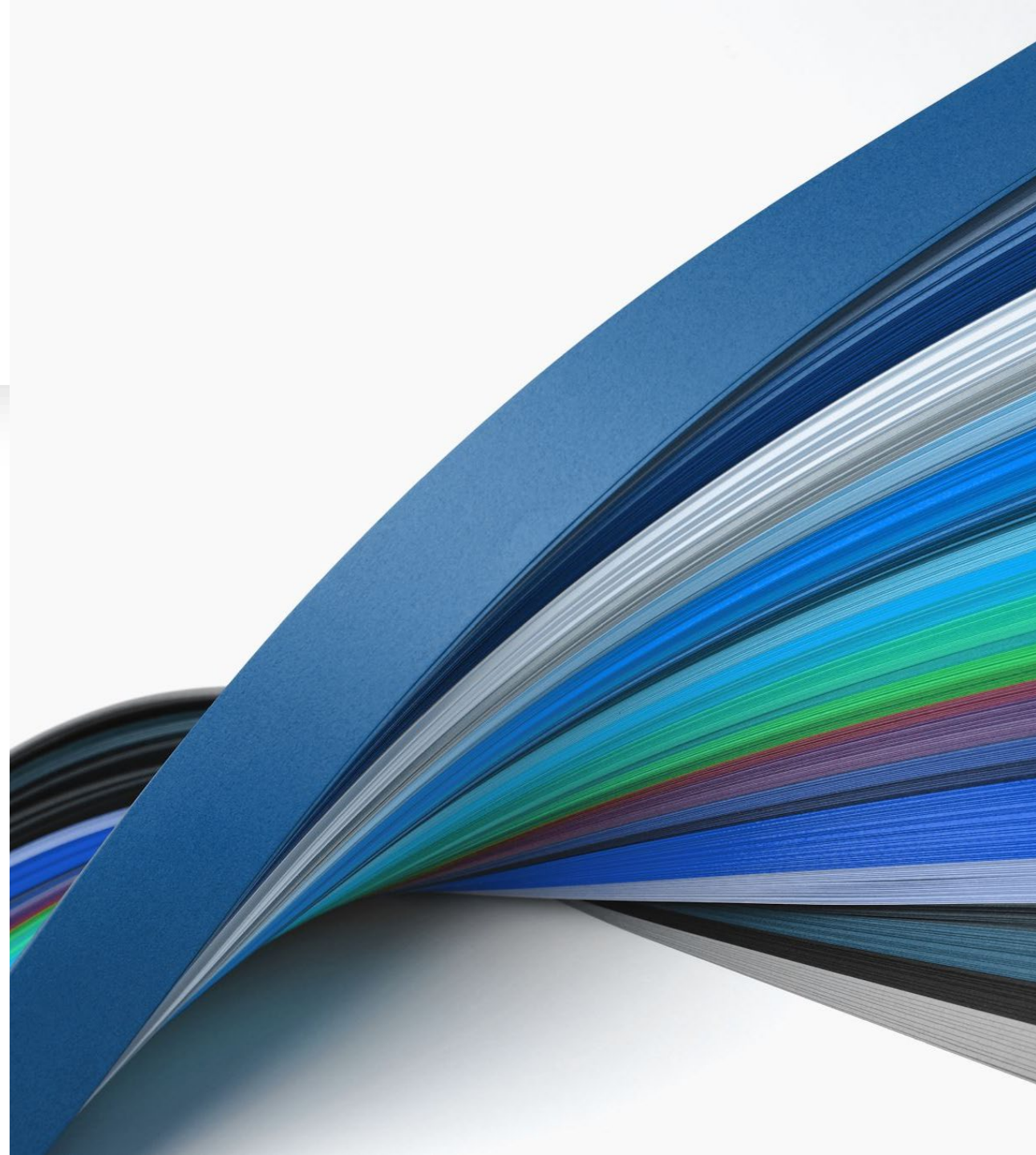
**Support Members in advocating
for the value of Independent
Insurance Agents with
consumers through local
marketing.**

Brand Development Project: Logo Services



Brand Development Project: Logo Services

Comprehensive, tiered logo and branding service designed to meet agents at every stage of their brand journey—from basic guidance to complete custom design.



Why a Strong Brand is a Business Advantage



“48% of small businesses say they lack a clear brand identity.”



Simplifying the Branding Journey for Members

Brand Questionnaire: Identify values, audiences, and tone

Logo Development: Visual translation of their story and strengths

Resource Toolkit: Fonts, color guides, templates, and social graphics

Pilot: Real Story. Real Impact.

We partnered with a local agency
ready to modernize their brand while
honoring their 100-year legacy



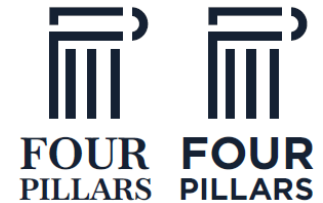
From Questions to Clarity



We began with a deep dive into who Four Pillars is.

Inspired by Place and Purpose

- Located in the state capital — home to the Old State Capitol building with its four iconic pillars.
- Each pillar represents one of the four owners — and one of the four core values.



The Four Pillars brand now embodies both its history and its future

The Result

Four Pillars Branding Guidelines

PRIMARY LOGO



COLOR



#152234
RGB: 21 34 52
CMYK: 90 77 52 61

ACCENTS



#cb2127
RGB: 203 33 39
CMYK: 13 100 98 4



#427e93
RGB: 66 126 147
CMYK: 77 40 33 4



#97a9b1
RGB: 151 169 177
CMYK: 43 26 25 0

FONT

BASKERVILLE SC

REGULAR SEMIBOLD
MEDIUM BOLD

ALTERNATIVE VARIATIONS





Four-Tier Service Structure

Logo Basics

Logo Basics: Self-serve resources including logo assessment checklists, best-practice guides, and professional review of your current logo files.

Logo Refresh

Logo Refresh: Perfect for polishing existing logos that need updated functionality and contemporary appeal.

Logo Maker

Logo Maker: Create a brand-new professional logo using our guided system. Choose from curated options for colors, fonts, layouts, and personalized design

Ultimate Package

Ultimate Package: Complete custom logo design with one-on-one designer collaboration, plus branded collateral including business cards and letterhead.

Resources

Logo File Types Quick Guide

Logos come in many different file formats – and for good reason! After you create a logo and receive a variety of files, you may be wondering: Why are there so many different file types? And what do I do with all of these? Or what's a vector file?

It may seem complicated to have all of these files, but when it comes to logos, it's important to match the right file type to each specific use.

We've created this easy resource for you to save and use as a quick guide to understand each file type and when to use them.

 File types for digital purposes

 File types for print purposes

PRO TIP: PDF or PNG files are the best file type choices to use or send if you are unsure what file type you need!

VECTOR FILES

AI	EPS	SVG	PDF
 	 	  	  
ADOBE ILLUSTRATOR FILE ✓ Vector or Working File ✓ Infinitely Scalable ✓ Editable (by designer) ✓ Design/Source file (where logo was made)	ENCAPSULATED POST SCRIPT ✓ Vector or Working File ✓ Infinitely Scalable ✓ Editable (by designer) ✓ Popular for Printing, but also digital uses.	SCALABLE VECTOR GRAPHIC ✓ Vector or Working File ✓ Infinitely scalable ✓ Editable (by designer) ✓ More popular for digital uses and websites.	PORTABLE DOCUMENT FORMAT ✓ Vector File or Working File ✓ Infinitely scalable ✓ Editable (by designer) ✓ Easy to share/view by anyone ✓ For print & digital uses
<i>Best for</i> sending to print shops, designers, or anyone asking you for an editable, vector, or working file or design file.	<i>Best for</i> sending to print shops, designers, or anyone asking you for an editable, vector, or working file or design file.	<i>Best for</i> sharing with designers or web developers. SVGs keep logos sharp at any scale (small/large) without pixelation.	<i>Best for:</i> universal file type for both printing and sharing online. PDFs can be raster or vector, but more likely are vector/editable/working.

Note You may not be able to preview vector file formats (AI, EPS, SVG) or personally use these files – but it's still important to keep them on hand for any needs specific to these vector/working file types.

RASTER FILES

JPG	PNG
  	  
JOINT PHOTOGRAPHIC EXPERTS GROUP ✓ Raster or Image Format ✓ Small file size – loads quickly ✗ Transparency not supported ✗ Not Directly Editable ✗ Scaling is Limited	PORTABLE GRAPHICS NETWORK ✓ Raster or Image Format ✓ Small file size – loads quickly ✓ Supports Transparency ✗ Not Directly Editable ✗ Scaling is Limited
<i>Best for</i> web-based designs (emails/websites/social). JPGs are a compressed file that can be viewed by all and loads quickly, but does not support transparency (white background will appear behind logo).	<i>Best for</i> web-based designs (emails/websites/social). PNGs can be viewed by all and loads quickly. PNGs do support transparent backgrounds, but file sizes are typically larger.

COLOR SPACES

 CMYK = Print CMYK files are for any project that will be printed such as business cards or brochures. Not best for screen use	 RGB = Digital RGB files are used for the digital purposes such as web graphics or digital displays. Not best for printing.
HEX #s (hexadecimal codes) are frequently used for web needs – these look like #F5302B. There is no difference between RGB and HEX different ways to say the same thing.	
Pantone/Spot (OFF-SET PRINT) You may or may not have/use Pantone Colors - their color accuracy is superior to CMYK, but can become costly using more than three colors.	

Logo Assessment Checklist

A logo is more than just a design – it's the face of your brand. To ensure your logo works across all platforms and maintains quality in all settings, evaluate it using this simple checklist. The questions and items listed are designed and scored to help us accurately assess the overall health of your logo. The ultimate goal is to define what you may be missing, identify room for improvement, and guide you toward best practices to ensure your logo functions as best as possible across all applications and within any marketing or backdrop.

→ Review the questions, check the boxes ☒ accordingly.

FILE TYPES:

Which file types do you have for your logo?

Vector File Types (CHECK ALL THAT APPLY)

☐ AI ☐ SVG ☐ EPS ☐ PDF

Raster File Types (CHECK ALL THAT APPLY)

☐ JPG ☐ PNG ☐ JPEG ☐ TIFF

VARIATIONS OF YOUR LOGO:

DIMENSION VARIATIONS

Does your logo have multiple dimension variations? Or just one? Review the examples and check 'yes' for all dimension variations you have of your logo.

☐ Horizontal



☐ Vertical/Stacked



☐ Icon (aka 'Bug' or 'Avatar')



LOGO ASSETS COLOR & FONTS

Do you know the color values used in your logo?

☐ YES ☐ NO ☐ UNSURE

Note: Color values can be any of the following: HEX codes, RGB or CMYK values, or Pantones

How many fonts are used in your logo:

☐ 1 Font ☐ 2 fonts ☐ 3+ fonts

Do you know the names of the font or fonts used in your logo? ☐ YES ☐ NO

Do you have the font files for those used in your logo? ☐ YES ☐ NO

BACKGROUND QUESTIONS:

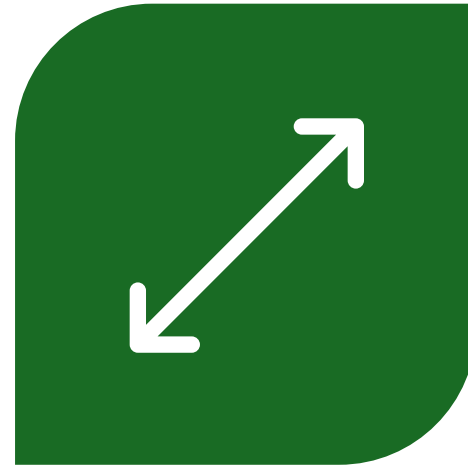
A professional designer created my logo. ☐ True ☐ False

My logo has been refreshed. or ☐ True

Timeline



SOFT LAUNCH JANUARY
2026



EXPAND AND TEST

Trusted Choice PR 2025-2026



Strategic Goals

1

Strengthen
regional/local
media presence

2

Provide members &
states with usable
PR tools

3

Position agents as
trusted advisors for
consumers

Agent PR Resource Library

Launch

Launch PR toolkit with best practices

Provide

Provide customizable templates for local outreach

Deliver

Deliver ready-to-use assets to make PR simple for members

PR Toolkit- Coming Soon

PR 101

Writing a Press
Release

Owned, Paid
and Earned
Media

Leveraging
LinkedIn

Identifying
Newsworthy
Stories

Speaking with
the Media

Maximizing
Media
Coverage

Building
Relationships
with the Media

Additional Agent Resources

Media Training:

Insiders look at how agents can build and amplify their brand through earned media and strategic communications.

State Media Lists:

Customized media contact databases will be provided to each state upon request, giving you direct access to relevant journalists and outlets in your market.

Consumer Survey – Legal System Abuse

- **Goal:** Gather General statistics around consumer understanding (or lack of understanding) regarding legal system abuse as it relates to impacting insurance and premiums to share with media, members and the industry.



National & State Collaboration



Partner with state associations to localize stories



Support regional outreach on timely issues (e.g., hurricanes, wildfires)



Build media lists & coordinate statewide radio tours (2026)



Align PR with national days, events, and news cycle

FY2026 State Grant Program Update

01

Supports states
in elevating
**independent
agents locally**

02

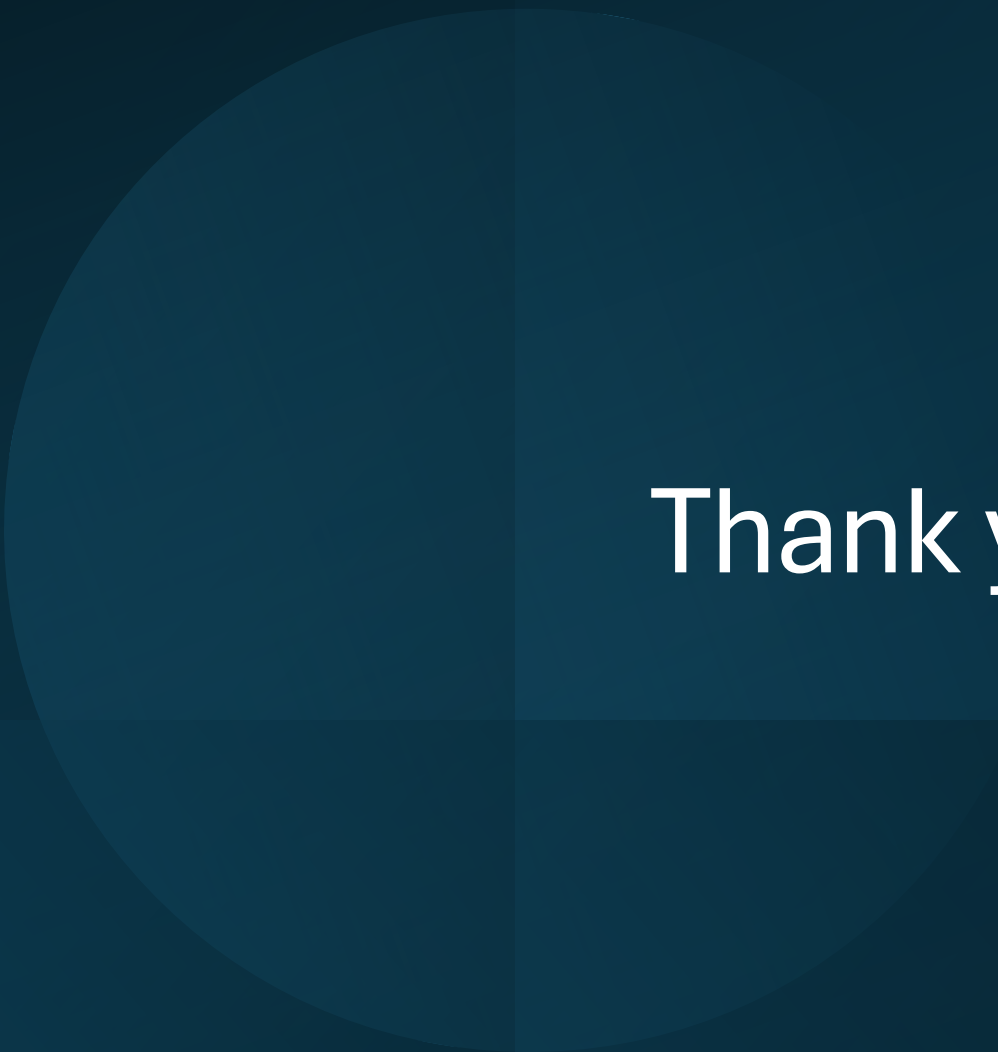
New focus:
**media & PR
efforts**

03

Goal: amplify
agents as **trusted
advisors** through
local media

04

Grants provide
**funding +
resources** for PR
initiatives



Thank you!