

# The Big

## ASSOCIATION NEWS AND VIEWS

### NATIONAL NEWS

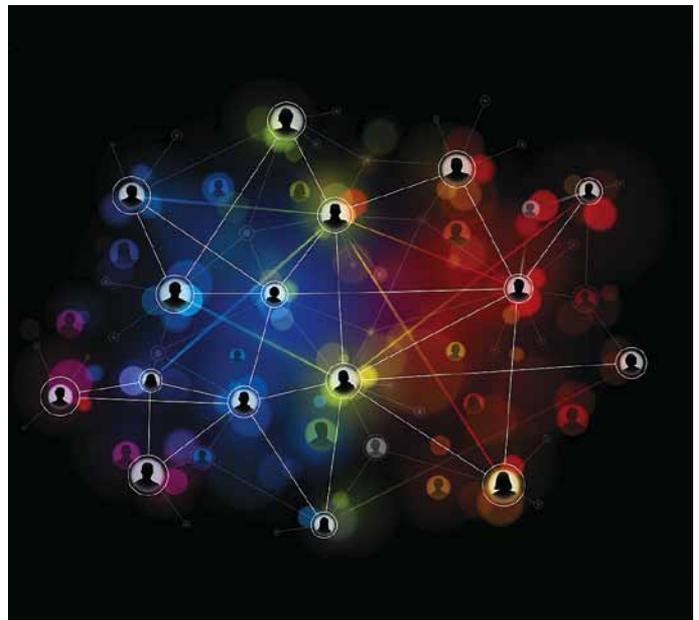
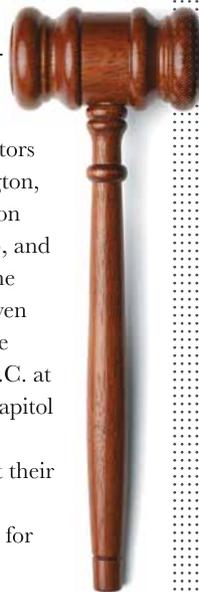
## Notice to Board of Directors and Members of IIABA

Pursuant to Article IV, Section 6. of the Bylaws of the Independent Insurance Agents & Brokers of America, Inc. ("IIABA"), notice is hereby given that a meeting of the Board of Directors of the IIABA will be held in Washington, D.C. at the Hyatt Regency Washington on Capitol Hill on April 24–25, 2015, and pursuant to Article V, Section 3. of the Bylaws of IIABA, notice is hereby given that a meeting of the Members of the IIABA will be held in Washington, D.C. at the Hyatt Regency Washington on Capitol Hill on April 24 or 25, 2015.

The Members will be requested at their meeting to:

- Elect the Chair-Elect of IIABA for the fiscal year 2015–2016;
- Ratify all actions taken by the Executive Committee, the Board of Directors, IIABA Committees and Officers, and IIABA staff since the membership meeting held on September 13, 2014; and
- Consider such other business as may appropriately come before them at the meeting.

*Scott D. Kneeland, General Counsel, IIABA  
Dated March 1, 2015, Alexandria, Virginia*



### NATIONAL NEWS

## Try Marketing Automation

**Want a personalized** way to contact prospects and clients?

Most agencies have critical business touches on their “should do” list, but not on their “to do” list. It’s just too expensive to track data, design a message and call everyone individually.

Marketing automation can help—especially if it’s integrated with your agency management system. And TrustedChoice.com makes it available through Agency Revolution, an endorsed provider of marketing automation services for agents and brokers.

Agency Revolution’s system connects with an agency management system to detect changes in the client lifecycle. It then reaches out at specific times using pre-selected messages that the agency can customize and can also connect with your website to follow up on leads.

Marketing automation helps agencies get more customers and more revenue per customer while increasing retention and powering a variety of outreach campaigns, including:

- Cross-sell
- Lead warming and follow-up
- Account review and renewal
- Lost customer reactivation
- Claims-process advocacy
- Referral and testimonial generation

Agency Revolution’s marketing automation software is part TrustedChoice.com’s menu of digital marketing services and is available at [agencyrevolution.com/tcia](http://agencyrevolution.com/tcia). Agencies that are active participants with TrustedChoice.com as Advantage subscribers receive a special discount of 10%.

Email [support@agencyrevolution.com](mailto:support@agencyrevolution.com) or call 888-208-9239 for more information.



**PROFILE**

**NICOLE COPPOCK**  
InVEST® Volunteer  
VIP Department,  
New Business Development  
Frank H Furman, Inc.



**How did you get involved with InVEST®?**

Being a young professional, I quickly took the opportunity to teach young people about insurance—which in my opinion should be mandatory. I was thrilled when I found out I would be teaching at Deerfield Beach High School with the same marketing teacher I had while I was there, Mr. Pizzo. Frank H Furman, Inc. has been 100% behind my every move with InVEST®. I focus on auto insurance, which is interesting to the students as most already drive or are fairly close. And believe me—they have no idea what to expect when it comes to their coverage.

**Why is this program important to the IA channel?**

We are giving anyone and everyone the opportunity to understand insurance, reaching an age group that is about to experience the need for insurance but may not know what they are purchasing. I love to share my personal knowledge and volunteering is my passion, so it's a win-win. Each year in the classroom is a great memory and I know it will only get better. As I tell all my students, insurance is here to stay—this is one profession that will not diminish.

**PRODUCTS**

## Big 'I' Retirement Just Got Easier

**For Big "I"** Multiple Employer Plan 401(k) plan participants, Big "I" Retirement Services, LLC has contracted vWise, Inc. to utilize SmartPlan—an online video enrollment portal that educates and enrolls participants while enabling them to make deferral and investment election changes.

Though short, easy-to-follow videos, the resource helps participants assess their retirement readiness by walking employees through their plan highlights and guiding them through an interactive Q&A.

The MEP 401(k) Plan, sponsored by Big "I" Retirement Services, is a way to lower your overall retirement plan costs while receiving consulting services, helpful educational tools and low-cost investment options. Big "I" Retirement Services partners with national firms to provide a unique member-only plan and helps simplify plan sponsors' administrative responsibilities while limiting fiduciary exposure. In partnership with Mesirow Financial, a 3(38) fiduciary, and MVP Plan Administrators, a customer service-oriented record-keeper, the Big "I" MEP 401(k) Plan is designed to maximize cost savings.



**PRODUCTS**

## Outgrowing Standard Homeowners?



**Far too many** financially successful clients are underinsured because they don't recognize the need for specialized coverage.

Big "I" Markets partner ACE offers resources for marketing to the underinsured. The ACE Platinum Portfolio minimizes coverage gaps and wasteful duplications that can occur with a collection of standard industry policies. It also earns an overall discount, and in most instances, the client will have just one policy to track and one bill to pay.

Features in the ACE Platinum Portfolio include:

- Full replacement cost coverage for dwellings and A&A for condos/co-ops
- Replacement cost on contents
- Extended replacement cost on home
- Total loss settlement option
- Medical expense amount of \$50,000
- Back-up of water/sewer to Coverage A limit
- Credit card/bank coverage up to \$100,000
- Deductible reserve with \$2,500 deductible or higher
- Unlimited ordinance and law coverage
- Tailored coverage amount for other structures and contents
- Identity fraud up to \$100,000

To check coverage availability for your state, log in to [bigmarkets.com](http://bigmarkets.com).