

## AAI

**Year Established:** 2001

**Agency Members:** 100

**States Agency Operates In:**

AZ, CO, GA, ID, IN, KS, KY, MO, MT, NE, NV, NM, OR, PA, SC, TN, TX, UT, WA, WV, WY

**Description of Network's management structure, goals, and agencies best served:**

We are a Business Development & Consulting member association whose emphasis is on helping people to move from insurance agents to business owners. Helping Agency Business Owners to move from HERE to THERE, faster more efficiently. We don't determine success for you rather help you unlock and realize it for yourself navigating the plateaus between of each stage of growth and success from "Scratch" to \$1m to \$3 to \$5 to \$10m and so on... We have system, process, people and resources to help you overcome your most pressing challenges as well maximize your under and untapped opportunities.

**Premium Controlled by Network:**

\$100 - \$150 million

**Services and Resources:**

1. Business Development & Consulting programs
2. Business Intelligence Analytics software & cutting-edge business tech tools
3. Carrier commission accounting
4. Administration & licensing setup and support
5. Peer Advisory Groups (Business Development)
6. Mentorship programs

**Top Commercial Lines Carriers:**

Liberty Mutual  
Nationwide Hartford  
Travelers

**Top Personal Line Carriers:**

Progressive  
Safeco  
State Auto  
Travelers

**Special Programs or Coverages:**

**Product Mix:**

- Property & Casualty %:
- Life %:
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:****Qualifications to Join Network:****Membership Coordinator:**

- Colt Carr
- VP: Business Development
- ccarr@insuranceaai.com
- 720-418-1250

**Address:**

2090 E. 104<sup>th</sup> Avenue  
Suite 300  
Thornton, CO 80233

**Email Address:**

ccarr@insuranceaai.com

**Phone Number:**

720-418-1250

## Agents Alliance of Montana LLC

**Year Established:** 2010

**Agency Members:** 18

**States Agency Operates In:**

MT

**Description of Network's management structure, goals, and agencies best served:**

We serve a large geographic area in Montana. Small independent agencies in rural areas. Our goals are networking problems with carriers, consolidation of production levels, and appointments of smaller agencies.

**Premium Controlled by Network:**

\$25 - \$100 million

**Services and Resources:**

Networking problem about operating small agencies in a state with 2 large national agencies expanding influence.

**Top Commercial Lines Carriers:**

Alliance

CBIC

Liberty Mutual

The Hartford

Travelers

**Top Personal Line Carriers:**

The Hartford

MetLife

Nationwide

Progressive

QBE

Safeco

Travelers

**Special Programs or Coverages:**

**Product Mix:**

- Property & Casualty %: 100
- Life %:
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:**

Captured agent looking to go Independent Agency. 40% of our agents were from a captive Farmers Union Agency system.

**Qualifications to Join Network:**

Minimum Premium/Revenue: \$500,00

Employee Count: 4

Other Criteria: Established client list.

**Membership Coordinator:**

- Michael Otness
- Manager
- mike@montana.insure
- 406-756-2500

**Address:**

P.O. Box 2790  
Kalispell, MT 59903

**Email Address:**

mike@montana.insure

**Phone Number:**

406-756-2500

## **AHA Insurance Network**

**Year Established:** 1998

**Agency Members:** 150

**States Agency Operates In:**

IN, KY, TN

**Description of Network's management structure, goals, and agencies best served:**

AHA is a Network Alliance Agency that is a distribution center for standard carriers. We help develop and build the infrastructure of new start-up agencies as well as existing agencies. We can get agents market access that they may not be able to get on their own at the highest commission rate than any other independent agent.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

We can give our agents the top commissions with not minimum requirements. We have an amazing "Backroom" support team to help agents establish a solid insurance business.

**Top Commercial Lines Carriers:**

Acuity  
Auto Owners  
Chubb  
CAN Grange  
Liberty Mutual  
Nationwide  
Philadelphia  
State Auto  
The Hartford  
Travelers  
Westbend

**Top Personal Line Carriers:**

AAA  
Auto Owners  
Grange  
MetLife  
Nationwide  
Safeco  
Secura  
State Auto  
Travelers

**Special Programs or Coverages:**

Major profit-sharing opportunities.

**Product Mix:**

- Property & Casualty %: 50% Personal 50% Commercial
- Life %:
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:**

An agent who has the ability to sell and be able to manage their own business. An agency with P/C insurance experience.

**Qualifications to Join Network:**

Minimum Premium/Revenue:

Employee Count:

Other Criteria:

**Membership Coordinator:**

- Mary Ann Underhill
- Regional Vice President
- maryannw@ahainsurancenetwork.com
- 502-741-3161

**Address:**

1250 South 3<sup>rd</sup> Street  
Louisville, KY 40203

**Email Address:**

maryannu@ahainsurancenetwork.com

**Phone Number:**

502-741-3161

## Alpha Associates

**Year Established:** 1984

**Agency Members:** 20

**States Agency Operates In:**  
NY, PA

**Description of Network's management structure, goals, and agencies best served:**

Each member agency has one voting member of our board of directors. We elect a new slate of officers from our board every two years. We best serve "Main Street" type agencies with a good mix of commercial and preferred personal lines business. We seek to continually produce and grow profitable business for our company partners, and in return, earn the ability to obtain the best company contracts that we can for our members, thereby increasing their profitability.

**Premium Controlled by Network:**  
\$100 – \$150 million

**Services and Resources:**  
Combined billing for agency association memberships, and personal line rating.

**Top Commercial Lines Carriers:**

Hanover  
Main Street America  
Merchants Mutual  
Philadelphia  
Preferred Mutual  
Selective  
The Hartford  
Travelers  
Utica National  
Several Mutuals and Co-ops

**Top Personal Line Carriers:**

Kemper  
Main Street America  
Merchants Mutual  
NYCM  
Preferred Mutual  
Safeco  
Travelers  
Utica National  
Several Mutuals and Co-ops

**Special Programs or Coverages:**

Exclusive Restaurant/Tavern WC Safety Group

**Product Mix:**

- Property & Casualty %: 90
- Life %: 3
- Annuity/Investments %: 2
- Health %: 5
- Other %:

**Ideal Agency Candidate:**

\$2-5 Million in premium, similar company mix, or willingness to roll business to our markets. Growing agency, with likelihood of that trend continuing. Excellent reputation within its own marketplace.

**Qualifications to Join Network:**

Minimum Premium/Revenue: \$1,000,000

Employee Count: N/A

Other Criteria: Similar company representation/mix of business.

**Membership Coordinator:**

- Christopher Dempsey
- President
- Christopher.rcdempsey.com
- 607-898-5134

**Address:**

102 Main Street  
Groton, NY 13037

**Email Address:** christopher@rcdempsey.com

**Phone Number:** 607-898-5134



## Associated Risk Managers - Kentucky & Ohio

**Year Established:** 1974

**Agency Members:** 20

**States Agency Operates In:**

KY, OH

**Description of Network's management structure, goals, and agencies best served:**

ARM KY & OH is 100% owned by its Member agencies and operates under Management by its Executive Director. ARM KY & OH are two State Chapters of the ARM National organization ([www.armiweb.com](http://www.armiweb.com)). Members are typically small to mid-size Independent Agencies whose collective ability provides special and/or exclusive access to insurance products and services.

**Premium Controlled by Network:**

\$100 - \$150 million

**Services and Resources:**

"Exclusive" access to standard and specialty insurance carriers; specialty insurance expertise; dedicated wholesale broker services; education and training; agent and agency networking events; wholly owned premium financing company; carrier contingency agreements; local, regional and national affiliations and business networking.

**Top Commercial Lines Carriers:**

**Top Personal Line Carriers:**

**Special Programs or Coverages:**

ARM KY & OH has more than 20 Special Programs - "Special Programs" means either: exclusive access for ARM Member agencies, higher original commissions, override commissions, collective contingency commission agreements, discounts for insureds, or discounts on purchases of services. Examples: exclusive access to <https://www.tmhcc.com/en-us/products/public-entity-insurance>; override brokerage commissions from Arlington/Roe, Risk Placement Services (RPS), RT Specialty, Worldwide Facilities (Tennant Risk) and other wholesale brokers; higher commission agreements with AIG Private Client, American Modern Group, Foremost.

**Product Mix:**

- Property & Casualty %: 100
- Life %:
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:**

Mid-sized local and regional agencies with strong reputations and longtime connections to their communities - we seek agencies with solid succession plans and/or ownership under 50 years old -

**Qualifications to Join Network:**

Minimum Premium/Revenue: No firm criteria

Employee Count: No firm criteria

Other Criteria: By Invitation Only

**Membership Coordinator:**

- Terry Quested
- Executive Director
- tq@armagent.net
- 740-936-5124

**Address:**

P.O. Box 175  
Galena, Ohio 43021

**Email Address:**

tq@armagent.net

**Phone Number:**

740-936-5124

## Axis Associated Insurance Brokers, LLC

**Year Established:** 2013

**Agency Members:** 25

**States Agency Operates In:**

CA

**Description of Network's management structure, goals, and agencies best served:**

Axis Brokers was established to help the smaller, growing agencies expand their offerings and/or entrepreneurial top producers who are looking to set up their own agency. In addition to market access, we have set up an agency management system (Applied Epic), contracted CSR services, Sales & Marketing Training and peer to peer support. Our goal is to help agencies grow and expand their business while providing true organic growth to our partner insurance companies.

**Premium Controlled by Network:**

\$150 – \$250 million

**Services and Resources:**

- Agency Management System (Epic)
- Access to CSR Services and help
- Sales and Marketing programs to grow sales
- Personal lines rating system

**Top Commercial Lines Carriers:**

Amtrust  
CAN  
CBIC  
Chubb  
Employers  
Guard  
Markel  
Mercury  
Nationwide  
Oregon Mutual  
Travelers

**Top Personal Line Carriers:**

Chubb  
Kemper Preferred  
Mercury  
National General  
Nationwide  
Oregon Mutual  
Safeco  
Stillwater  
Travelers

**Special Programs or Coverages:** No proprietary programs currently but have access to specialty winery programs through company relationships.

**Product Mix:**

- Property & Casualty %: 75
- Life %:
- Annuity/Investments %:
- Health %: 5
- Other %: 20

**Ideal Agency Candidate:** We are ideally looking for entrepreneurial types who are looking to take their book of business or insurance skill sets and start their own agency. Existing agencies that have a new growth motivation or new ownership who is looking to upgrade technology and or sales systems. Agency owners who are providing professional long-term risk management services for their clients and customers.

**Qualifications to Join Network:**

Minimum Premium/Revenue: N/A

Employee Count: N/A

Other Criteria: Looking for agencies that are growth oriented through new sales production.

**Membership Coordinator:**

- Bret Gedryn
- VP of Sales
- [bret@axisbrokers.com](mailto:bret@axisbrokers.com)
- 408-426-6202

**Address:**

1777 Hamilton Avenue  
Suite 2250  
San Jose, CA 95125

**Email Address:** [bret@axisbrokers.com](mailto:bret@axisbrokers.com)

**Phone Number:** 408-426-6202

## **CMS Insurance Service Inc**

**Year Established:** 1984

**Agency Members:** 145

**States Agency Operates In:**

IN, KY, MO, OH, TN, WV

**Description of Network's management structure, goals, and agencies best served:**

CMS was established 34 years ago to help the independent agency remain independent. Our agent partners retain full ownership of the business placed with us, and more importantly their entire agency. We provide a very costs effective solution for the small to medium sized family owned agency.

**Premium Controlled by Network:**

\$25 million

**Services and Resources:**

CMS provides hands on support for the daily challenges of placing new business from underwriting to policy issuance. We provide solutions for most any issue an agency may face from product and system training to assisting with exit strategies.

**Top Commercial Lines Carriers:**

Hartford

Markel

State Auto

Travelers

**Top Personal Line Carriers:**

AAA

Aegis

American Modern Insurance

Grange

Progressive Home-ASI

SafeCo

State Auto

Travelers

**Special Programs or Coverages:**

CMS has a commercial consulting program available designed to teach an agent how to become a commercial producer.

**Product Mix:**

- Property & Casualty %: 100
- Life %:
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:**

Small to medium sized family owned independent agency as well as new startups.

**Qualifications to Join Network:**

Minimum Revenue: No Minimum

Employee Count: No Minimum

**Membership Coordinator:**

- Tyler Siddens
- Marketing Manager
- Tyler@cmsinsurance.net
- 270-991-3994

**Address:**

600 Church Street South

Suite 5

Ripley, WV 25271-1666

**Email Address:**

mark@cmsinsurance.net

**Phone Number:**

304-372-1138

## Combined Agents of America

**Year Established:** 1997

**Agency Members:** 65

**States Agency Operates In:**

CO, KS, MO, OK, TX, NE

**Description of Network's management structure, goals, and agencies best served:**

Member owned network, managed with a staff of 5. Agencies with a minimum of \$1,000,000 in revenue that align with our core carriers.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

**Top Commercial Lines Carriers:**

Central

Nationwide

Travelers

**Top Personal Line Carriers:**

Central

Nationwide

Safeco

Travelers

**Special Programs or Coverages:**

**Product Mix:**

- Property & Casualty %: 100
- Life %:
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:**

**Qualifications to Join Network:**

Minimum Premium/Revenue: N/A

Employee Count: N/A

Other Criteria: N/A

**Membership Coordinator:**

- Jan Gold
- Business Team
- [jan@combinedagents.com](mailto:jan@combinedagents.com)
- 512-231-0117

**Address:**

6805 N Capital of Texas Highway  
Austin, TX 78731

**Email Address:** [jan@combinedagents.com](mailto:jan@combinedagents.com)

**Phone Number:** 512-231-0117



## Dream Agency Network Insurance

**Year Established:** 2016

**Agency Members:** 10

**States Agency Operates In:**

AL, FL, GA, NV, TN

**Description of Network's management structure, goals, and agencies best served:**

LLC Management with member input to help achieve goals and profitable Heavy Preferred personal lines and simpler commercial lines.

**Premium Controlled by Network:**

< \$25 million

**Services and Resources:**

- Business consulting
- Perpetuation
- Agency Valuation
- Target Marketing Retention Strategies
- Cross Selling
- Life Consulting
- Buy & Sell Agreements

**Top Commercial Lines Carriers:**

Travelers

**Top Personal Line Carriers:**

Encompass

Safeco

The General

Travelers

**Special Programs or Coverages:**

**Product Mix:**

- Property & Casualty %: 95
- Life %: 5
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:**

10M Preferred Personal Lines with good loss ratios.

**Qualifications to Join Network:**

Minimum Premium/Revenue: 1 million preferred personal lines with documented loss ratio

Employee Count: 1

Other Criteria: N/A

**Membership Coordinator:**

- Faye Bean
- Network Manager
- faye@daniagent.com
- 865-688-1855

**Address:**

10101 Sherrill Boulevard

Knoxville, TN 37912

**Email Address:** faye@daniagent.com

**Phone Number:** 865-688-1855

## First Choice Agents Alliance, LLC

**Year Established:** 2015

**Agency Members:** 97

**States Agency Operates In:**

AL, AZ, AR, CA, CT, DE, FL, GA, IL, IN, IA, KS, KY, MD, MI, MN, MS, MO, NV, NH, NY, NC, OH, PA, RI, SC, TN, TX, VA, WV, WI

**Description of Network's management structure, goals, and agencies best served:**

Full time administrators for both commercial and personal lines, supported by an in-house brokerage unit for non-appointed carriers. Focus is on agency perpetuation and helping to grow the next generation of producers.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

Educational support, E&O access, in-house brokerage

**Top Commercial Lines Carriers:**

AmTrust  
Builders Mutual  
CHUBB  
Donegal  
GUARD  
Liberty Mutual  
MetLife  
State Auto  
Travelers  
Utica  
Westfield

**Top Personal Line Carriers:**

Donegal  
Kemper  
MetLife  
National General  
Safeco  
State Auto  
Travelers  
Westfield

**Special Programs or Coverages:**

E&O, E&S

**Product Mix:**

- Property & Casualty %: 100
- Life %:
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:**

Growth focused.

**Qualifications to Join Network:**

Minimum Premium/Revenue: \$2,000,000

Employee Count: 3

Other Criteria: Favorable loss ratio

**Membership Coordinator:**

- Diane Wagner
- Chief Operating Officer
- [diane@fcaalliance.com](mailto:diane@fcaalliance.com)
- 888-895-2115

**Address:**

P.O. Box 5390  
Mooresville, NC 28117

**Email Address:**

[info@fcaalliance.com](mailto:info@fcaalliance.com)

**Phone Number:**

888-895-2115

## Horizon Agency Systems

**Year Established:** 2017

**Agency Members:** 16

**States Agency Operates In:**

AZ, CA, CO, GA, MI, NM, ND, TX, UT, WA

**Description of Network's management structure, goals, and agencies best served:**

Converting existing captives, and scratch agencies although we do take on existing industry agencies as well.

**Premium Controlled by Network:**

< \$25 million

**Services and Resources:**

Heavily discounted rates

Management

Website

**Top Commercial Lines Carriers:**

Liberty Mutual

Nationwide

Progressive

The Hartford

Travelers

**Top Personal Line Carriers:**

Kemper

MetLife

Nationwide

Progressive/ASI

Safeco

Travelers

**Special Programs or Coverages:**

**Product Mix:**

- Property & Casualty %: 85
- Life %: 5
- Annuity/Investments %:
- Health %: 10
- Other %:

**Ideal Agency Candidate:**

A Farmers (or other captive) Agency owner looking for market access without the non-compete the other organizations bring to the table.

**Qualifications to Join Network:**

Minimum Premium/Revenue: N/A

Employee Count: 1

Other Criteria: E&O, license, and location

**Membership Coordinator:**

- Uwe Phillip Kirch "Trout"
- trout@agency.builders
- 970-778-6000

**Address:**

751 Horizon Court

Suite 100

Grand Junction, CO 81506

**Email Address:** horizon@agency.builders

**Phone Number:** 855-999-2774

## Indium

**Year Established:** 2005

**Agency Members:** 360

**States Agency Operates In:**

DE, FL, GA, IL, IN, KY, MD, MI, MO, NC, OH, PA, VA

**Description of Network's management structure, goals, and agencies best served:**

We were founded by independent agents working together to help independent agents stay independent. Because we are founded, owned and directed by independent agents, we offer the most agent-friendly partnership agreement options in the industry, and our solutions for growth, profitability, and perpetuation are organically developed, tested and approved by agents, for agents. With that as our pedigree and our noble purpose, our partnership agreements guarantee that our agency partners maintain 100% ownership of their business with no non-compete clauses, no first-rights of refusal, and the freedom for our agency partners to go direct, with no cost to leave.

**Premium Controlled by Network:**

\$25 - \$100 million

**Services and Resources:**

Training, technology, producer development, perpetuation planning, business intelligence, HR and lending/financing.

**Top Commercial Lines Carriers:**

CAN  
Chubb  
Liberty Mutual  
Travelers

**Top Personal Line Carriers:**

American Modern  
Chubb  
Encompass  
Safeco  
Travelers

**Special Programs or Coverages:**

**Product Mix:**

- Property & Casualty %: 100
- Life %:
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:**

As our mission is to help our agency partners and companies grow profitably, we look for agencies who believe in the independent distribution model of insurance and are looking to preserve independence for themselves and their agency. We like our agency partners to represent two or more regional or national standard lines carriers and have at least a 3-year history of profitable growth. We also look for agency partners who can demonstrate the need and capacity for leveraging Indium and our partner companies to achieve profitable growth objectives.

**Qualifications to Join Network:**

Minimum Premium/Revenue:

Employee Count:

Other Criteria: 3-5 years of historical profitable growth

**Membership Coordinator:**

- Jodi Ingram
- Operations Specialist
- [jingram@goindium.com](mailto:jingram@goindium.com)
- 614-942-1460

**Address:**

2400 Corporate Exchange Drive  
Suite 100  
Columbus, OH 43231

**Email Address:**

[getanedge@goindium.com](mailto:getanedge@goindium.com)

**Phone Number:**

614.942.1460



## Insurance Brokers Incorporated

**Year Established:** 1974

**Agency Members:** 275

**States Agency Operates In:**

CO, IL, IN, MI, MO, OH, PA, TN

**Description of Network's management structure, goals, and agencies best served:**

Insurance Brokers Incorporated (IBI) is a general agency and wholesaler located in the Midwest. Our goal is to provide our customers with market access and products to help them reach their full potential.

**Premium Controlled by Network:**

\$25 – \$100 million

**Services and Resources:**

- Comparative Rating
- Downloading
- Networking Opportunities
- Competitive Commissions
- Licensed CSR's
- Friendly Contract

**Top Commercial Lines Carriers:**

ACE

Hartford

IAT

MUSIC

The Hartford

**Top Personal Line Carriers:**

Founders Insurance

Hanover Fire

Lighthouse Casualty

MetLife

Nationwide

Travelers

**Special Programs or Coverages:**

**Product Mix:**

- Property & Casualty %: 100
- Life %:
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:**

We work with established agents looking for a niche and new agent looking for everything.

**Qualifications to Join Network:**

Minimum Revenue: No Minimum

Employee Count: No Minimum

Other Criteria: Interest and Need for IBI Products

**Membership Coordinator:**

- Lisa Pike
- Marketing Representative
- lpike@goibi.com
- 317-888-2593

**Address:**

400 Camby Court  
Greenwood, IN 46142

**Email Address:**

gpomeroy@goibi.com

**Phone Number:**

317-888-2593

## Insurance Pro Agencies

**Year Established:** 1982

**Agency Members:** 250

**States Agency Operates In:**

AL, AZ, AR, CA, CO, CT, DE, GA, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MO, MT, NE, NH, NJ, NM, NV, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, VA, WA, WV, WI, WY

**Description of Network's management structure, goals, and agencies best served:**

IPA is a network of independent insurance agencies offering a strong lineup of A-rated national carriers in property & casualty, life, and health, for personal and commercial lines. We specialize in supporting Captive & Independent Agents who want to start their own independent insurance agency and helping existing independent agencies take their business to the next level.

**Premium Controlled by Network:**

\$25 - \$100 million

**Services and Resources:**

IPA provides full back-office support, service centers, training, resource site, discounted comparative raters and more.

**Top Commercial Lines Carriers:**

CAN  
Guard  
Liberty Mutual  
MetLife  
Nationwide  
The Hartford  
Travelers

**Top Personal Line Carriers:**

Encompass  
MetLife  
Nationwide  
Progressive  
Safeco  
Stillwater

**Special Programs or Coverages:**

**Product Mix:**

- Property & Casualty %: 85
- Life %: 10
- Annuity/Investments %:
- Health %: 5
- Other %:

**Ideal Agency Candidate:**

IPA is seeking top producers who have a proven ability to sell and are seeking the right opportunity to gain financial independence and more freedom in their lives.

**Qualifications to Join Network:**

Minimum Premium/Revenue: \$100,000 minimum premium

Employee Count: N/A

Other Criteria: 1 year experience selling P&C; willing to get an office in a business location within 6 months.

**Membership Coordinator:**

- Dave O'Reilly
- Director of Operations
- dave@insuranceproagencies.com
- 708-745-5080

**Address:**

15255 S. 94<sup>th</sup> Avenue  
Suite 410  
Orland Park, IL 60462

**Email Address:** dave@insuranceproagencies.com

**Phone Number:** 708-745-5080

## Insurance Services of the West, LLC

**Year Established:** 2017

**Agency Members:** 110

**States Agency Operates In:**

AZ, CA, CO, HI, ID, IL, IN, IA, KS, MI, MN, MO, MT, NE, NV, NM, ND, OH, OR, PA, SD, TN, UT, WA, WI, WY

**Description of Network's management structure, goals, and agencies best served:**

Board of Directors, Associates are Nationwide AIDCO/ELITE agencies with average Nationwide DWP of 1.5Mil and 4.5 Mil total. Small and local

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

Technology, Marketing and Management

**Top Commercial Lines Carriers:**

Amtrust  
Berkshire Hathaway  
Guard  
Liberty Mutual  
Nationwide  
The Hartford  
Zurich

**Top Personal Line Carriers:**

Mapfire  
Nationwide  
Progressive  
Safeco  
Travelers

**Special Programs or Coverages:**

Technology Package

**Product Mix:**

- Property & Casualty %: 90
- Life %: 5
- Annuity/Investments %:
- Health %: 5
- Other %:

**Ideal Agency Candidate:**

Nationwide AIDCO/Elite Agency with average Nationwide DWP of 1.5 million, and 4 million total. 5 years or more in business, small to mid-size and local.

**Qualifications to Join Network:**

Minimum Premium/Revenue: \$2,500,000/\$75,000

Employee Count: 1-2

Other Criteria: Nationwide Elite Agency

**Membership Coordinator:**

- Michael F. Haller, CIC
- Director of Administration
- mike.haller@insuranceserviceswest.com
- 425-681-0996

**Address:**

P.O. Box 2393

1405 SW 14<sup>th</sup> Avenue

Redmond, WA 98073-2393

**Email Address:**

mike.haller@insuranceserviceswest.com

**Phone Number:**

425-681-0996

## ISU Insurance Agency Network

**Year Established:** 1979

**Agency Members:** 200

**States Agency Operates In:**

AL, AK, AZ, AK, CA, CO, CT, DE, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MT, NE, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, RI, PA, SC, SD, TN, UT, VT, VA, WA, WV, WI, WY

**Description of Network's management structure, goals, and agencies best served:**

The ISU Insurance Agency Network, headquartered in San Francisco, is managed through 6 regional offices. Our goal is supporting our Members goal of independence, growth and profitability. We target Agencies with a minimum of \$1MM to \$25MM revenue. We are committed to quality not quantity.

**Premium Controlled by Network:**

\$250 million

**Services and Resources:**

National Brand recognition for excellence and quality in all we do. Licensing in all 50 states. Direct access to carriers and their systems. Risk placement as requested; comprehensive database of the collective books of business and knowledge of all the members; carrier contract negotiations; M&A advice/consulting; access to preferred providers of HR, Safety, Claims Administration, ISU Member Incentive trips with preferred carriers; Annual national conference and Fall regional forums with carriers and vendors at both.

**Top Commercial Lines Carriers:**

AIG

Allstate Insurance

AmTrust North America

AmWINS

Arrowhead Gen. Ins.

Atlas General Insurance Atlas General Insurance

Auto-Owners

Berkshire Hathaway Homestate Co. (BHHC)

Berkshire Hathaway

Homestate Co. (BHHC)

Burns & Wilcox

Chubb Insurance

CNA Insurance

CompWest

Core Programs

CRC

Crouse & Associates  
CSE Insurance  
Deans & Homer  
DB Insurance  
EMC Insurance  
Employers Comp Insurance Group  
Everest Insurance Company  
Evolve MGA  
Grange Insurance  
Great American Insurance  
Guard Insurance  
Hanover Insurance  
Hartford Steam Boiler  
ICW Group  
KBIC  
Kemper  
Liberty Mutual Mountain Region  
Liberty Mutual Northwest Region  
Liberty Mutual: Pacific Region (CA only)  
Liberty Mutual Midwest  
Liberty Mutual Southeast  
Main Street American Group (MSA)  
Markel Specialty Insurance  
Mercury  
MetLife CL  
MetLife Flood  
National General  
Nationwide  
NIAC  
NSM Insurance Oregon Mutual  
Pacific Compensation Insurance Co  
Philadelphia Insurance Companies  
Preferred Employers  
Progressive Insurance  
Republic Indemnity  
RPS  
RT Specialty  
Safehold



Secura Specialty Insurance  
Seneca Insurance Society Insurance  
State Auto  
Tapco  
Travelers  
United Fire Group (Financial Pacific)  
West Bend Mutual Insurance  
Worldwide Facilities  
Zenith

**Top Personal Line Carriers:**

AIG  
Allstate Insurance  
American Collectors  
American Modern  
American Strategic Insurance/Progressive Home  
AmWINS  
Auto-Owners  
Burns & Wilcox  
Chubb Insurance  
CRC  
CSE Insurance  
Deans & Homer  
Encompass Insurance Company  
First American Specialty  
Foremost  
Grange Insurance  
Hagerty  
Hanover Insurance  
Hartford Insurance  
Kemper  
Main Street American Group (MSA)  
Mapfre  
MetLife  
MetLife Flood  
NatGen Premier  
National General  
Nationwide  
Nationwide Private Client

Oregon Mutual  
Palomar Specialty  
Presidio Exchange  
Progressive Insurance  
Prospect General  
Safeco  
State Auto  
Tapco  
Travelers  
Universal Property and Casualty  
West Bend  
Mutual  
Insurance  
Worldwide  
Facilities

**Special Programs or Coverages:**

Our most preferred program is our contractual agreement with our Members and the significant financial returns we generate for our Members which we achieve by focusing on the quality of the business we write, and the creativity applied to our carrier compensation agreements.

**Product Mix:**

- Property & Casualty %: 87
- Life %: 2
- Annuity/Investments %: 1
- Health %: 10
- Other %:

**Ideal Agency Candidate:**

Well established and successful independent agency with a minimum of \$1,000,000 in revenue, and an impeccable reputation and a commitment to quality and excellence in all they do.

**Qualifications to Join Network:**

Minimum Premium/Revenue: 1,000,000 revenue  
Employee Count: 10

**Membership Coordinator:**

- Steve Pearson
- President
- spearson@joinisu.com
- 415-623-5147

**Address:**

201 California Street  
Suite 200  
San Francisco, CA 94111

**Email Address:**

spearson@joinisu.com

**Phone Number:**

415-623-5147

## Keystone

**Year Established:** 1983

**Agency Members:** 278

**States Agency Operates In:**

GA, IL, IN, KY, MI, MN, MO, NC, OH, PA, TN, VA, WI

**Description of Network's management structure, goals, and agencies best served:**

Our corporate office employees 110 individuals. There are five executive officers. We are currently in 12 states with plans to eventually cover most of the US. We look for established, successful agencies with excess of 10 million in property and casualty premium. Those agencies must possess that desire and potential to grow their agency.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

Programs, commercial marketing, business development, captives, bonds, risk management, claims, producer recruitment, producer development and training, human resources, legal, benefits, financial services, perpetuation, best practices, agency management, leadership development, marketing, social media and automation.

**Top Commercial Lines Carriers:**

Accident Fund  
Donegal  
EMC  
Liberty Mutual  
Nationwide  
Penn National  
The Hartford  
Travelers  
Secura  
United Fire  
West Bend  
Westfield

**Top Personal Line Carriers:**

Donegal  
Progressive  
Safeco  
Travelers

**Special Programs or Coverages:**

School bus, municipalities, daycare, golf course, pollution, cyber liability, and many more.

**Product Mix:**

- Property & Casualty %: 75
- Life %: 5
- Annuity/Investments %:
- Health %: 20
- Other %:

**Ideal Agency Candidate:**

Already doing well with a desire to further enhance their current growth plans. Must possess a tiered age group of producers which creates a solid perpetuation for the agency with guaranteed future growth.

**Qualifications to Join Network:**

Minimum Premium/Revenue: 5 million premium/3-10 million revenue

Employee Count: 10

Other Criteria: Profitable, growing, good reputation, financially sound.

**Membership Coordinator:**

- Elizabeth Schenk
- Vice President, Sales & Geographic Expansion
- eschenk@keystoneinsgrp.com
- 570-473-2144

**Address:**

1995 Point Township Road  
Northumberland, PA 17857

**Email Address:**

eschenk@keystoneinsgrp.com

**Phone Number:**

570-473-2144

## National Insurance Group

**Year Established:** 2015

**Agency Members:** 100+

**States Agency Operates In:**

AZ, CA, CO, CT, FL, ID, IL, IN, IA, MA, MI, MN, MO, MT, NV, NH, NJ, NM, OH, OR, RI, PA, TX, UT, VT, WA, WY

**Description of Network's management structure, goals, and agencies best served:**

Two very entrepreneurial 30 Year veterans, reinventing How insurance "should be" distributed. Futurists, bringing forward thought and process to Insurance and Non-insurance folks that want into our industry. we act very much like consultants that also aggregate premium. A concierge group, not a take all comers; quality over quantity.

**Premium Controlled by Network:**

\$100 - \$150 million

**Services and Resources:**

- Marketing Analysis
- Ninja Sales
- No Quote Pledge Training
- Weekly Consultation for Startups
- Monthly Strategy
- Individualized Services
- Accounting
- Management Access

**Top Commercial Lines Carriers:**

Liberty Mutual  
The Hartford  
Travelers

**Top Personal Line Carriers:**

Mapfre  
National General  
Safeco  
Travelers

**Special Programs or Coverages:**

See [nationalinsgrp.com](http://nationalinsgrp.com) for public programs offered. Password protected programs for associates.

**Product Mix:**

- Property & Casualty %: 99
- Life %:
- Annuity/Investments %:
- Health %: 1
- Other %:

**Ideal Agency Candidate:**

- New Out of the Box Thinking
- Creative
- Looking at New Ways
- Unique Process
- Very High Sales Closing Ratio and Retention

**Qualifications to Join Network:**

Minimum Premium/Revenue:

Employee Count:

Other Criteria: Heavy phone screening. Management roundtable. Business plan submission.

**Membership Coordinator:**

- Charlie Downey
- President & CEO
- charlie@nationalinsgrp.com
- 508-970-3380

**Address:**

190 East Main Street

P.O. Box 570

Marlborough, MA 01752

**Email Address:**

charlie@nationalinsgrp.com

**Phone Number:**

508-970-3380

**Northlake Insurance Group, Ltd.**

**Year Established:** 1989

**Agency Members:** 16

**States Agency Operates In:**

LA

**Description of Network's management structure, goals, and agencies best served:**

**Premium Controlled by Network:**

\$150 - \$250 million

**Services and Resources:**

Producer interaction and carrier knowledge in marketing

**Top Commercial Lines Carriers:**

Hanover

Liberty Mutual

Traveler

**Top Personal Line Carriers:**

Hanover

Republic

Safeco

**Special Programs or Coverages:**

**Product Mix:**

- Property & Casualty %: 90
- Life %: 3
- Annuity/Investments %:
- Health %: 7
- Other %:

**Ideal Agency Candidate:**

\$15million premium

Single location

At least \$500K with 3 or 4 current group carriers

**Qualifications to Join Network:**

Minimum Premium/Revenue: \$15 million

Employee Count:

Other Criteria: Be in a city where no other member is located



**Membership Coordinator:**

- Craig Thomson
- N/A
- cthomson@tslins.com
- 337-228-0850

**Address:**

8560 Jefferson Highway  
Baton Rouge, LA 70809

**Email Address:**

barryb@blumbergassoc.com

**Phone Number:**

225-767-1442

## Secured Advantage

**Year Established:** 2014

**Agency Members:** 75

**States Agency Operates In:**

IN, KY, MI, OH, PA

**Description of Network's management structure, goals, and agencies best served:**

We are a program manager.

**Premium Controlled by Network:**

\$100 - \$150 million

**Services and Resources:**

- Discounted E&O
- Perpetuation assistance
- Agency Enhancement Programs
- Conference and network development

**Top Commercial Lines Carriers:**

Grange

Hanover

Motorists

Ohio Mutual

Wayne

**Top Personal Line Carriers:**

Grange

Hanover

Motorists

Ohio Mutual

Wayne

**Special Programs or Coverages:**

Discounted access to capital at Live Oak Bank.

**Product Mix:**

- Property & Casualty %: 98
- Life %: 1
- Annuity/Investments %: 1
- Health %:
- Other %:

**Ideal Agency Candidate:**

Agency looking for greater profitability and connectivity to other likeminded agency owners.

**Qualifications to Join Network:**

Minimum Premium/Revenue: n/a

Employee Count: n/a

Other Criteria: Historically profitable book with core carrier.

**Membership Coordinator:**

- Ted Rusinoff
- National Sales Director
- Ted.rusinoff@secured-advantage.com
- 330-620-3559

**Address:**

1101 Sugarbush Drive

SA

Ashland, OH 44805

**Email Address:**

Ted.rusinoff@secured-advantage.com

**Phone Number:**

614-456-7623

## Smart Choice

**Year Established:** 1994

**Agency Members:** 7,000

**States Agency Operates In:**

AL, AZ, AK, CA, CO, CT, DE, FL, GA, ID, IL, IN, IA, KS, KY, LA, MD, MA, MI, MN, MO, NE, NV, NJ, NM, NY, NC, OH, OK, OR, PA, SC, TN, TX, UT, VA, WA, WV, WI

**Description of Network's management structure, goals, and agencies best served:**

Smart Choice has 53 employees and 80 territory managers and state directors that manage 45 states. We serve all sizes of agencies. Because of our multiple programs we can meet the needs of agencies moving from captive situations and a range of startup, established, and large agency partners.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

We provide training, in house agency for hard to place risks and commercial, discounts on management systems, eaters, and CE. We help agencies manage their books of business to maximize profitability with partner carriers.

**Top Commercial Lines Carriers:**

CAN  
Grange  
Guard  
Guideone  
Liberty  
Main Street  
MET  
Nationwide  
State Auto  
Travelers

**Top Personal Line Carriers:**

Allstate  
Foremost  
Grange  
Mercury  
Met  
Nationwide  
Safeco  
State Auto  
Travelers

**Special Programs or Coverages:**

- Middle market access through smart start
- Express Markets access to most all E&S brokers
- Church and dental programs

**Product Mix:**

- Property & Casualty %: 98
- Life %: 2
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:** Any agent with a passion for the industry and the ability to partner for organic growth within our plant. We work best with former captive agents that are moving to the independent channel.

**Qualifications to Join Network:**

Minimum Premium/Revenue: N/A

Employee Count: N/A

Other Criteria: We want agents that can qualify for several appointments through partner carriers.

**Membership Coordinator:**

- Andrew Caldwell
- President
- [acaldwell@smartchoiceagents.com](mailto:acaldwell@smartchoiceagents.com)
- 336-217-4649

**Address:**

4121 Beechwood Drive  
Greensboro, NC 27410

**Email Address:** [acaldwell@smartchoiceagents.com](mailto:acaldwell@smartchoiceagents.com)

**Phone Number:** 336-217-4649

## TechAssure

**Year Established:** 2000

**Agency Members:** 27

**States Agency Operates In:**

CA, CO, FL, IL, IN, KS, MD, MA, MN, MO, NH, NJ, NY, NC, OH, PA, SC, TX, UT, VA, WA

**Description of Network's management structure, goals, and agencies best served:**

TechAssure is a global network of retail brokers/agents that specialize in technology and cyber related risks. Our goals are to share best practices & IP among members and work with carrier partners to develop coverage enhancements to better serve our members' clients.

**Premium Controlled by Network:**

< \$25 million

**Services and Resources:**

We provide members access to tools and resources specific to managing tech and cyber risks (eRiskHub, AXCO, Corax, etc.). We also work with carriers to develop enhanced policy wordings and some profitability enhancements. We also have a private member community online for members to ask questions, share ideas, access tools, etc.

**Top Commercial Lines Carriers:**

AIG  
CFC  
Chubb  
CAN  
One Beacon  
The Hartford  
Travelers

**Top Personal Line Carriers:**

This is not our focus. But, most members also write personal lines. Chubb, PURE, Liberty, Travelers would all be prime carriers for this.

**Special Programs or Coverages:**

Proprietary D&O programs with Chubb and CFC. Working on enhancing endorsements with CNA and One Beacon now.

**Product Mix:**

- Property & Casualty %: 50
- Life %: 5
- Annuity/Investments %:
- Health %: 45
- Other %:

**Ideal Agency Candidate:**

\$10-\$50M in annual revenues; niche-focused in tech, cyber, life science/biotech; strong in-house knowledge/IP; willingness to share and participate.

**Qualifications to Join Network:**

Minimum Premium/Revenue: \$1 million

Employee Count: n/a

Other Criteria: Technology E&O/Cyber expertise and/or life science/biotech expertise. Carrier/member nomination.

**Membership Coordinator:**

- Garrett Droege
- Executive Director
- garrett@techassure.com
- 704-728-7232

**Address:**

210 Delburg Street  
Davidson, NC 28036

**Email Address:**

garrett@techassure.com

**Phone Number:**

704-728-7232

## Total Insurance Plus, LLC

**Year Established:** 1998

**Agency Members:** 49

**States Agency Operates In:**

KY, NC, SC, TN, VA

**Description of Network's management structure, goals, and agencies best served:**

Our network is for growth oriented, established agencies that have a historical positive loss ratio history. If you are looking for a lower cost group with excellent payouts for profit sharing for agencies of all sizes.

**Premium Controlled by Network:**

\$150 – \$250 million

**Services and Resources:**

**Top Commercial Lines Carriers:**

Accident Fund  
Builders Mutual  
Nationwide  
The Hartford  
Travelers

**Top Personal Line Carriers:**

Central Mutual  
Foremost  
MetLife  
National General  
Nationwide  
Safeco  
State Auto  
Travelers

**Special Programs or Coverages:** Strong regional carrier access.

**Product Mix:**

- Property & Casualty %:
- Life %:
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:** Looking for agencies that are driven by excellence of reputation, that performs above industry standards for growth and profitability.



**Qualifications to Join Network:**

Minimum Premium/Revenue: \$1,500,000

Employee Count: N/A

**Membership Coordinator:**

- Mark Breeden
- Managing Partner
- markbreeden@breedeninsurance.com
- 366-309-0530

**Address:**

312 West Center Street

PO Box 2137

Lexington, NC 27292

**Email Address:** markbreeden@breedeninsurance.com

**Phone Number:** 336-309-0530

## Trusted Insurance Alliance

**Year Established:** 2009

**Agency Members:** 17

**States Agency Operates In:**

RI

**Description of Network's management structure, goals, and agencies best served:**

Trusted Insurance Alliance (TIA) is a group of seventeen Rhode Island based insurance agencies with a proven track record of success.

**Premium Controlled by Network:**

\$100 - \$150 million

**Services and Resources:**

Consolidation of results including growth and performance incentives

**Top Commercial Lines Carriers:**

Beacon Mutual

EMC

Liberty Mutual

Ohio Mutual

**Top Personal Line Carriers:**

Main Street America

Mapfre

Progressive

Providence Mutual

Safeco

Travelers

UPC

**Special Programs or Coverages:**

**Product Mix:**

- Property & Casualty %: 100
- Life %:
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:**

Agency's between \$5 Million and \$15 Million of annual premium.

**Qualifications to Join Network:**

Minimum Revenue: \$4 million premium

Employee Count: n/a

Other Criteria: Proven track record of profitability and performance.

**Membership Coordinator:**

- Robert Loiselle
- Managing Director
- bob@tialliance.com
- 401-723-8510

**Address:**

279 Dexter Street  
Pawtucket, RI 02860

**Email Address:**

bob@alliance.com

**Phone Number:**

401-723-8510

## **TWFG Holding Company, LLC**

**Year Established:** 2001

**Agency Members:** 3500

### **States Agency Operates In:**

AK, CA, CO, CT, DE, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, NE, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, VA, WA, WV, WI, WY

### **Description of Network's management structure, goals, and agencies best served:**

TWFG General Agency Program provides agents with access to products, technology and tools to help them build their business. We offer a variety of personal lines and commercial markets, life, health and annuities with preferred national carriers. We provide real solutions to help our agents serve their clients, freedom to work how you please, carrier access and highly competitive commissions. ☑ Exclusive Independent Agency Program we offer experienced agents who are looking for opportunities to start their independent office to join our organization. We provide:

- Over 300 National and Regional Carriers
- Highly Competitive Commissions
- Reduced Expenses for E&O and Technology
- Back Office Accounting – Both Commissions and Agency Bill Accounting
- Group Benefits
- Immediate Equity
- Marketing Tools and a Website
- Ongoing Training and Support
- Guaranteed Succession Plan

### **Premium Controlled by Network:**

> \$250 million

### **Services and Resources:**

TWFG TPA provides service for Technology and System; TWFG is a Program Administrator.

### **Top Commercial Lines Carriers:**

AmTrust  
AmWINS  
Burns and Wilcox  
Liberty  
MetLife  
National General  
Nationwide  
Progressive  
The Hartford  
Travelers

**Top Personal Line Carriers:**

AIG  
Chubb  
Encompass  
Mercury  
MetLife  
Nationwide  
Progressive  
Safeco  
Travelers  
UPC

**Special Programs or Coverages:**

TWFG carrier offering Home, Wind (TX only) and Flood (TX and LA).

**Product Mix:**

- Property & Casualty %:
- Life %:
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:****Qualifications to Join Network:****Membership Coordinator:**

- Name
- Title
- Email Address
- Phone Number

**Address:**

1201 Lake Woodlands Drive  
Suite 4020  
The Woodlands, Texas 77380

**Email Address:****Phone Number:**

218-367-3424

## United Valley Insurance Services

**Year Established:** 1983

**Agency Members:** 85

**States Agency Operates In:** AZ, CA

**Description of Network's management structure, goals, and agencies best served:**

Corporate office based in Fresno is comprised of 25 full time employees. Relationship managers work closely with member principals to select markets, develop growth plans and align agencies with additional resources, as needed. 10-member marketing team supports member agencies with commercial lines and marketing and placement of accounts. Networks selects best in class, experienced property and casualty member agencies with a preferred customer focus, professional tenured staff and a clear plan for growth.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

Profit sharing; business continuity consulting, claims and complex risks consulting; centralized marketing support and educational workshops and webinars; discounted preferred vendors.

**Top Commercial Lines Carriers:**

Liberty Mutual  
Nationwide  
The Hartford  
The Zenith  
Travelers

**Top Personal Line Carriers:**

CIG  
Kemper  
Mercury  
Nationwide  
Safeco  
Travelers

**Special Programs or Coverages:**

**Product Mix:**

- Property & Casualty %: 100
- Life %:
- Annuity/Investments %:
- Health %:
- Other %:

**Ideal Agency Candidate:**

Special Program: Worldwide Insurance Agents E&O Program

**Qualifications to Join Network:**

Minimum Premium/Revenue: Target agencies 3 million + premium, commercial lines focused with at least three preferred direct appointments

Employee Count: none

Other Criteria: Well respected, profitable by carrier partners and has a growth plan.

**Membership Coordinator:**

- John Perkins
- Vice President
- John-perkins@unitedvalley.com
- 559-256-2572

**Address:**

3245 W Figarden Drive  
Fresno, CA 93711

**Email Address:** rene-sawn@unitedvalley.com

**Phone Number:** 559-256-2522

## Voldico Insurance

**Year Established:** 2010

**Agency Members:** 120

**States Agency Operates In:**

CT, DE, FL, GA, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, MT, NE, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, VA, WA, WV, WI, WY

**Description of Network's management structure, goals, and agencies best served:**

Voldico offers a truly unique opportunity to own and operate an agency accessing market leading carriers and providing a full range of industry-leading operational and customer service support. We are an ideal fit for existing or new independent agents and captive agents looking to go independent.

**Premium Controlled by Network:**

\$25 - \$100 million

**Services and Resources:**

- Sales and marketing support
- Quoting and risk placement support
- Full customer service center support for policy and claims handling
- Integrated Agency Management
- Accounting with P&L support
- Training and Professional Development
- Peer Group Advisory Meetings
- Acquisition and Perpetuation Support

**Top Commercial Lines Carriers:**

AIG  
Chubb  
Grange  
Liberty Mutual  
Markel  
Nationwide  
Philadelphia  
Progressive  
Selective  
State Auto  
The Hartford  
Travelers  
USLI

**Top Personal Line Carriers:**

Chubb  
Foremost Insurance  
Grange



Indiana Farmers  
Nationwide  
Progressive  
Safeco  
Selective  
State Auto  
Travelers  
Western Reserve  
University Property

**Special Programs or Coverages:**

- Agriculture
- Online Retailing
- Public Entity Contractors

**Product Mix:**

- Property & Casualty %: 75
- Life %: 10
- Annuity/Investments %: 10
- Health %: 5
- Other %:

**Ideal Agency Candidate:**

Results orientated; taking pride in ownership of growing a dynamic agency in their local community.

**Qualifications to Join Network:**

Minimum Premium/Revenue: \$0 building to > \$500,000

Employee Count: 1+

Other Criteria: Licensed with a business plan for growth or perpetuation.

**Membership Coordinator:**

- Andrew Vollmer
- Director of Sales
- avollmer@voldico.com
- 812-756-1924

**Address:**

420 South Buckeye  
Osgood, Indiana 47037

**Email Address:**

jvollmer@voldico.com

**Phone Number:**

866-341-2674