

## 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

## Advantage Partners Network

**Year Established:** 2004

**Agency Members:** 500+

**States Agency Operates In:**

AZ, CA, CT, DE, FL, GA, IL, ME, MI, NJ, NY, NC, OH, PA, RI, SC, TN, TX, VA, WI

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

Helping Agents Achieve Greater Success! Direct Carrier Appointments, No Contracts, Agent Owns 100% of the Business, Top Commissions & Profit Sharing.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

- E & O
- Digital Technology
- Agency Management
- System & Comparative Rater Solutions
- Perpetuation & Financial Options
- Consulting

**Top Commercial Lines Carriers:**

American European Insurance  
AmTrust  
Attune  
CAN  
Chubb  
KBIC  
Liberty Mutual  
Nat Gen

**Top Personal Line Carriers:**

AIG  
Chubb  
Heritage  
MetLife  
Mercury  
NatGen  
Narragansett  
PCG  
Safeco  
Travelers  
UPC  
Vault

Velocity

**Special Programs or Coverages:**

Agent E & O and P & C beauty program.

**Product Mix:**

Property & Casualty %: 100

Life %:

Annuity/Investments %:

Health %:

Other %:

**Ideal Agency Candidate:**

Growth oriented, professional and passionate agents looking for an ideal Network relationship partner to help their agency grow and prosper.

**Qualifications to Join Network:**

Minimum Premium/Revenue: None; all size agents eligible.

Employee Count: 1+

Other Criteria: n/a

**Membership Coordinator:**

- James G. Bastian
- Co-Founder/CEO
- jamesb@apagents.com
- 866-443-8859

**Address:**

73 Cutter Mill Road  
Great Neck, NY 11021

**Email Address:**

info@apagents.com

**Phone Number:**

866-443-8859

## 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:****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

## ANE Agency Network Exchange, LLC

**Year Established:** 2009

**Agency Members:** 70

**States Agency Operates In:**

NJ

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

Corporate employees, regional managers and staff. Seeking agencies with 10-50 employees with potential and desire to generate profitable growth.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

Programs, sales training, business planning, perpetuation and succession planning, producer school, producer training and coaching, agency evaluations, intellectual capital, best practices, vendor discounts, special incentives, profit sharing, leadership peer groups, coordinated production planning, product and marketing opportunities.

**Top Commercial Lines Carriers:**

Chubb

Hartford

Liberty Mutual

Nationwide

Selective

Travelers

**Top Personal Line Carriers:**

Franklin Mutual

Plymouth Rock

Travelers

**Special Programs or Coverages:**

Vertafore, RMS Hospitality, E&S, 1-4 family habitational, restaurants, bars and taverns, NY contractors, Lloyds CGL, life insurance, and preferred vendor programs.

**Product Mix:**

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

**Ideal Agency Candidate:**

Upward path with growth potential, desire to plan for future growth and adapt to the necessary changes needed to thrive in our current and future marketplace.

**Qualifications to Join Network:**

Minimum Premium/Revenue: \$1 million revenue

Employee Count: 8

Other Criteria: Growing profitability

**Membership Coordinator:**

- Elizabeth Schenk
- CEO
- eschenk@ane-agents.com
- 800-700-9643

**Address:**

3759 US Highway 1

Suite 200

Monmouth Junction, PA 08852

**Email Address:**

eschenk@ane-agents.com

**Phone Number:**

800-700-9643

## 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
- 614-392-2866

**Address:**

752 North State Street  
Westerville, OH 43082

**Email Address:**

tq@armagent.net

**Phone Number:**

614-392-2866

**Associated Risk Managers, South, Inc.**

**Year Established:** 1989

**Agency Members:** 24 agencies in 40 locations

**States Agency Operates In:**

AL, AR, LA, MS

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

We are a marketing network of Independent Insurance Agencies who work together to accomplish goals unattainable on their own.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

Collaboration on marketing, leads and sale assistance, and market information.

**Top Commercial Lines Carriers:**

AIG

Cincinnati

Chubb

Liberty Mutual

Travelers

**Top Personal Line Carriers:**

AIG

Safeco

Travelers

**Special Programs or Coverages:**

**Product Mix:**

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

**Ideal Agency Candidate:**

Willing to work with other to achieve common goals. Independent and wants to stay independent!

**Qualifications to Join Network:**

Minimum Premium/Revenue: n/a

Employee Count: n/a

Other Criteria: Must be recommended by a current member.

**Membership Coordinator:**

- Dan Gleason
- President
- dgleason@armsouth.com
- 601-856-1978

**Address:**

P.O Box 2367  
Madison, MS 39130

**Email Address:**

dgleason@armsouth.com

**Phone Number:**

601-856-1978



## 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.

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**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:**

**Membership Coordinator:**

- Jan Gold
- Business Team
- 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

## Georgia Agency Partners, Inc.

**Year Established:** 1995

**Agency Members:** 15

**States Agency Operates In:**

FL, GA, SC, TN

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

Georgia Agency partners (GAP) is a partnership of fifteen independent insurance agencies working together pooling our knowledge and resources to provide consumers with the most comprehensive coverage possible to protect their personal and business investments. Founded in 1995, GAP has excellent relationships with National and Regional insurance carriers. GAP is run by an Executive Director and board of directors made up of representation of all 15 agencies and has 3 operating committees which steer the organization to meet goals and objectives. The primary objectives of GAP are organic sales, achieved by providing resources to member agencies that they may not be able to obtain independently as well as maximizing compensation and expense reduction.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

Aggregated Compensation Contracts, Consolidated Vendor Contracts, Shared Operational Services.

**Top Commercial Lines Carriers:**

Auto Owners  
Cincinnati  
Frankenmuth  
Selective  
Travelers

**Top Personal Line Carriers:**

Auto Owners  
Cincinnati  
Chubb  
Encompass  
Travelers

**Special Programs or Coverages:**

- Captive
- Exclusive Deals

**Product Mix:**

- Property & Casualty %: 86
- Life %: 4
- Annuity/Investments %: 1

- Health %: 9
- Other %:

**Ideal Agency Candidate:**

Mid to Large agency with similar carrier alignment and geographical spread to enhance our current footprint.

**Qualifications to Join Network:**

Minimum Premium/Revenue: None

Employee Count: None

Other Criteria: We are looking for partners who are geographically aligned with current partners who bring carrier relationships and volume to enhance our current network.

**Membership Coordinator:**

- Meredith Rominger
- Executive Director
- meredith@gapins.org
- 912-667-4546

**Address:**

P.O. Box 877  
Statesboro, GA 31404

**Email Address:**

meredithrominger@comcast.net

**Phone Number:**

912-667-4546

## Horizon Agency Systems

**Year Established:** 2017

**Agency Members:** 16

**States Agency Operates In:**

AK, AZ, CA, CO, GA, ID, MI, MT, ND, NE, NM, NV, OH, OR, SC, SD, TX, UT, WA

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

Horizon was founded on the premise of providing a turnkey opportunity to independent agency ownership. Our member agencies are aligned with top carriers, one of the highest commission structures and bonus potential from dollar one. We strive to provide the top software and web presence a starting, growing, or mature agency needs at a fraction of the retail cost. In-depth, direct, and peer mentorship are the key to the long-term success of our agencies.

We have no non-compete or restrictions on exit and offer full ownership of their agency from day one. There are no buyout fees or hindrance to succession or sale. We have a program for each scenario from new agency owner, to former captive agency owner, to well-established agency needing carriers or wanting to increase bonuses or commissions.

**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, 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: n/a

Employee Count: n/a

Other Criteria: 3-5 years of historical profitable growth

**Membership Coordinator:**

- Scott Richards
- Leader of Sales & Brand Marketing
- srichards@goindium.com
- 614-942-1472

**Address:**

175 South 3<sup>rd</sup> Street  
#940  
Columbus, OH 43215

**Email Address:**

srichards@goindium.com

**Phone Number:**

614-942-1472



## Insurance Agency Network

**Year Established:** 2017

**Number of Agency Members:** 125

**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:**

Insurance Agency Network is headquartered in Redmond, WA, managed by a Board of Directors and active executive mgt. Our goal is to support members in driving growth, profitability and best practices for independent agents. Targeted agencies with a minimum of \$1M – 1.5M DWP.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

Technology, Marketing, and Management

**Top Commercial Lines Carriers:**

AmTrust  
Berkley North Pacific  
Berkshire – Guard  
Liberty Mutual  
Markel  
National General  
Nationwide  
State Auto Insurance  
The Hartford

**Top Personal Line Carriers:**

Encompass  
Foremost  
Haggerty  
Mapfre  
National General  
Nationwide  
Nationwide Private Client  
Safeco  
State Auto Insurance

**Special Programs or Coverages:**

- Technology Package
- Marketing

**Product Mix:**

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

**Ideal Agency Candidate:**

Established independent agency with long range plan. Nationwide AIDCO and Exclusive agents.

**Qualifications to Join Network:**

Minimum Premium/Revenue: 2.5M DWP or greater

Employee Count: n/a

Other Criteria: n/a

**Membership Coordinator:**

- Michael Haller, CIC
- Director
- mhaller@insuranceagencynetwork.com
- 425-681-0996

**Address:**

8195 166<sup>th</sup> Avenue NE

Redmond, WA 98073

**Email Address:**

mhaller@insuranceagencynetwork.com

**Phone Number:**

425-681-0996

## Insurance Associates of America, LLC

**Year Established:** 1995

**Agency Members:** 90+

**States Agency Operates In:**

AL, AZ, AR, CA, CO, CT, DE, FL, GA, ID, IL, IN, IO, 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:**

Members own 100% of their book of business. Members range from 1-person agencies to 30-employee agencies. Members range from 100% PL to 100% CL and everything in between. Members are licensed directly with carriers and can work directly with most carriers when they use them on a regular basis. Our members were existing independent agencies, captive agents or agents at an existing independent agency.

**Premium Controlled by Network:**

\$150 - \$250 million

**Services and Resources:**

Any and all backroom support the member wants. From just providing markets to quoting to servicing clients.

**Top Commercial Lines Carriers:**

Auto Owners  
Liberty  
Nationwide  
State Auto  
Travelers  
West Bend

**Top Personal Line Carriers:**

Auto Owners  
Kemper  
MetLife  
Nationwide  
Safeco  
Travelers

**Special Programs or Coverages:**

**Product Mix:**

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

**Ideal Agency Candidate:**

An agency looking to grow.

**Qualifications to Join Network:**

Minimum Premium/Revenue: None

Employee Count: 1

Other Criteria: 2 years' experience

**Membership Coordinator:**

- Laurel Brinkman
- Marketing Manager
- lbrinkman@iaanetwork.com
- 262-754-5252

**Address:**

17500 West Liberty Lane

New Berlin, WI 53146

**Email Address:**

steve@iaanetwork.com

**Phone Number:**

262-754-5252

## 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
- lpik@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 Producers Network

**Year Established:** 2009

**Agency Members:** 75

**States Agency Operates In:**

AZ, CO, FL, IL, IN, IO, KS, KY, MI, MN, MO, NE, NV, NM, ND, OR, SD, TX, WA, WI

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

IPN was founded in June 2009. Today, we have over 75 locations in eight states. We are licensed and serve clients in over twenty states throughout the country. We are not like most other groups in that we do not recruit. People find us or are referred to us by other agents and/or carriers. Our culture is what I think sets us apart. We truly have a team first attitude. When one succeeds, we all succeed. We've been told, there is nothing that compares to our culture and contract. We have a great reputation among our carriers and producers, both within IPN and those outside of our group. We give agents the opportunity to build their business, without the heavy commission splits, or expenses. We understand it's not just what you make that's important...but what you keep. We also provide CSR support to help agents with service work, quoting, and submitting business. We offer Commercial Specialist support to help agents with writing commercial accounts. We offer weekly training sessions via webinars, and quarterly group meetings throughout the year. Our goal is to continue to serve our agents, and give them what they need to be productive, and profitable.

**Premium Controlled by Network:**

\$25 - \$100 million

**Services and Resources:**

Commercial Marketing Specialists, CSR Program, Training and support, Technology suite, Website presence, shared bonuses.

**Top Commercial Lines Carriers:**

Acuity  
AmTrust  
Auto Owners  
Integrity  
Progressive  
United Fire

**Top Personal Line Carriers:**

AAA  
Auto Owners  
Encompass  
Nationwide  
Progressive  
Safeco  
Travelers

**Special Programs or Coverages:**

**Product Mix:**

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

**Ideal Agency Candidate:**

Positive, hardworking, team friendly, loyal, trustworthy, experienced in insurance, focused on quality, successful, financially stable.

**Qualifications to Join Network:****Membership Coordinator:**

- Christopher Matt Amack
- President/CEO
- mattamack@mnipn.com
- 952-381-4048

**Address:**

100 Prairie Center Drive  
Suite 220  
Eden Prairie, MN 55344

**Email Address:**

mattamack@mnipn.com

**Phone Number:**

952-381-4048

## 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
- mhaller@insuranceagencynetwork.com
- 425-681-0996

**Address:**

P.O. Box 2393

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

Redmond, WA 98073-2393

**Email Address:**

mhaller@insuranceagencynetwork.com

**Phone Number:**

425-681-0996

## Insurance Specialist Network

**Year Established:** 2017

**Agency Members:** 40

**States Agency Operates In:**

AZ, CO, IL, IA, KS, MN, MS, NE, ND, TX, WI

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

ISN works with both captive agency owners and independent agency owners. Our goal is to provide outstanding support for our agency partners while giving them the tools they need to grow and own their own agencies.

**Premium Controlled by Network:**

< \$25 million

**Services and Resources:**

- Quoting and management software
- Commercial underwriting support
- Communication software

**Top Commercial Lines Carriers:**

Guard  
Liberty Mutual  
Travelers

**Top Personal Line Carriers:**

Encompass  
Kemper  
Progressive  
Safeco  
Travelers

**Special Programs or Coverages:**

- Commercial Shadowing Program
- Commercial Assistance Program

**Product Mix:**

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

**Ideal Agency Candidate:** Agency-owner or experienced agency-manager with sound business model and professional network.

**Qualifications to Join Network:**

**Membership Coordinator:**

- Greg Clark
- Recruiting Manager
- greg.clark@isnagents.com
- 952-856-8720

**Address:**

1001 Twelve Oaks Center Drive  
Suite 1012  
Wayzata, MN 55391

**Email Address:** info@isnagents.com

**Phone Number:** 612-395-4827

## Iroquois Group

**Year Established:** 1977

**Agency Members:** 2,200

**States Agency Operates In:**

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

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

Iroquois® is a network of more than 2,000 independent agencies in 41 states writing over \$1 Billion in premium with affiliated Carrier-Partners. Agencies with premium from \$2 million to more than \$100 million join Iroquois to grow revenue, profits and agency value, without sacrificing independence. Given the regional nature of insurance, Iroquois is structured in 5 regions, each run by a Managing Partner.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

Profit sharing, bonus opportunities, advice, support and training, vendor discounts

**Top Commercial Lines Carriers:**

Travelers  
Liberty Mutual  
Hartford  
Main Street America

**Top Personal Line Carriers:**

Travelers  
Safeco  
MetLife  
Main Street America

**Special Programs or Coverages:**

**Product Mix:**

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

**Ideal Agency Candidate:**

**Qualifications to Join Network:**

Iroquois is looking for established, professionally run, independent agencies interested in partnering with Iroquois to build agency revenue, profits and value.

**Membership Coordinator:**

- Alice Keesler
- Member Liaison
- akeesler@iroquoisgroup.com
- 716-373-5511 ex. 327

**Address:**

35 West Main Street  
Allegany, NY 14706

**Email Address:**

admin@iroquoisgroup.com

**Phone Number:**

716-373-5511



## ISU Insurance Agency Network

**Year Established:** 1978

**Agency Members:** 200

**States Agency Operates In:**

AL, AZ, AR, CA, CO, FL, GA, ID, IN, IL, IO, KS, KY, LA, MD, MI, MN, MO, MT, NV, NJ, NM, NY, NC, ND, OH, OR, PA, SC, SD, TN, TX, UT, WA, WI

**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:**

\$1BB

**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

## MarshBerry Connect Platform, LLC

**Year Established:** 2019

**Agency Members:** 30+

**States Agency Operates In:**

AL, AK, AZ, AR, CA, CO, CT, DE, FL, GA, HI, 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, VA, VT, WA, WV, WI, WY

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

Exclusively offered to firms participating in MarshBerry's Connect Peer Exchange Network, organizations can plug into the MarshBerry Connect Platform ("Platform") to amplify and access resources and capabilities designed to differentiate their value proposition to clients and carrier partners.

Currently, the Connect Platform Member Profile is 25 with combined P&C premiums of \$3.6 Billion+. Total combined revenues are in excess of \$650 Million+ and an impressive collective Organic Growth rate of 8.57% (vs. a MarshBerry Network average of 6.4%).

Key components include high quality, real time Business Intelligence. Additionally, Resource Optimization and WorkGroups are leveraged to amplify existing assets and to fill in gaps, where current resources may be limited. Ultimately, we are looking for high organic growth P&C and Benefits firms with revenues of \$3MM or greater.

**Premium Controlled by Network:**

**Services and Resources:**

Please contact David Soforenko for details.

**Top Commercial Lines Carriers:**

Please contact David Soforenko for details.

**Top Personal Line Carriers:**

Please contact David Soforenko for details.

**Special Programs or Coverages:**

Please contact David Soforenko for details.

**Product Mix:**

- Property & Casualty %: 70
- Life %: 5
- Annuity/Investments %: 1
- Health %: 24
- Other %:



**Ideal Agency Candidate:**

Organic growth-oriented firms looking to differentiate themselves.

Qualifications to Join Network:

Minimum Premium/Revenue: \$3,000,000

Other Criteria: Must join Marshberry Connect Network to be part of the Marshberry platform.

**Membership Coordinator:**

- David Soforenko
- Executive Vice President
- david.sorofenko@marshberry.com
- 440-220-4101

**Address:**

28601 Chagrin Boulevard

Suite 400

Woodmere, OH 44122

**Email Address:**

david.sorofenko@marshberry.com

**Phone Number:**

440-220-4101

## 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 million - 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

## **New Jersey Agents Alliance, LLC**

**Year Established:** 2010

**Agency Members:** 15

**States Agency Operates In:**  
NJ

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

The NJAA is 100% member-owned and was created to provide a competitive advantage for a limited number of the high-quality agencies. We are always looking for new partners that bring unique value to the group and are interested in peer-to-peer collaboration, developing unique sales strategies and implementation of industry best practices.

**Premium Controlled by Network:**  
\$150 - \$250 million

**Services and Resources:**

P&C Underwriting support, sales training, group medical sales, life, disability and retirement planning services, Payroll & HR solutions, as well as digital marketing & business development solutions.

**Top Commercial Lines Carriers:**

Chubb  
CNA  
Hartford  
Liberty Mutual  
Merchants  
Nationwide  
Selective  
Travelers

**Top Personal Line Carriers:**

Andover  
Cumberland  
Encompass  
Franklin Mutual  
MetLife  
Nationwide  
Preferred Mutual  
Selective  
Travelers

**Special Programs or Coverages:**

HR services, Payroll, Retirement planning.

**Product Mix:**

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

**Ideal Agency Candidate:**

We are looking for agencies that want to stay independent, grow their business and value collaborating with a peer group on a regular basis. We focus on underwriting profitability and providing competitive advantages that enable our agents to compete & win new and renewal business.

**Qualifications to Join Network:**

Minimum Premium/Revenue: \$750,000

Employee Count: 5

Other Criteria: Impeccable reputation and focus on growth.

**Membership Coordinator:**

- Bob Mazey
- President
- bobm@newjerseyagentsalliance.com
- 732-820-7222

**Address:**

1800 Route 34  
Suite 207  
Wall, NJ 07719

**Email Address:**

bobm@newjerseyagentsalliance.com

**Phone Number:**

732-820-7222

**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
- cthomson@tslins.com
- 337-228-0850

**Address:**

8560 Jefferson Highway  
Baton Rouge, LA 70809

**Email Address:**

barryb@blumbergassoc.com

**Phone Number:**

225-767-1442

## Oli Insurance Services

**Year Established:** 2017

**Agency Members:** 53

**States Agency Operates In:**

AZ, CA, CO, GA, IL, MO, NV, NM, NY, OR, WA

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

Our management team is made up of Strategic, Operational and Customer Relationship executives and we are focused on providing our partners with comprehensive resources and solutions to help their agencies grow and thrive. Smaller growing agencies who need broad market access, as well as technology resources, market intelligence & direction and back office support are who we serve most effectively.

**Premium Controlled by Network:**

\$25 - \$100 million

**Services and Resources:**

Technology, Market Intelligence, Back Office Support, Virtual Assistant Support, fully outsourced fulfillment and service lines of business that fall outside your area of expertise.

**Top Commercial Lines Carriers:**

AmTrust  
BHHC  
CAN  
Employers  
Guard  
Hanover  
Hartford  
Hiscox  
Liberty Mutual  
Nationwide  
Philadelphia  
Pie  
Progressive  
Travelers



**Top Personal Line Carriers:**

ACE/Chubb  
AIG  
Allied  
Kemper  
Mapfre  
MetLife  
Natgen  
Progressive  
Safeco  
Travelers

**Special Programs or Coverages:**

- Non-profit Workers' Compensation
- Janitorial All Lines
- Restaurants Workers' Compensation
- Port 'o' Potty Package
- Nightclub GL

**Product Mix:**

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

**Ideal Agency Candidate:**

1. Agencies who are not happy with their current access partner and are looking for a new partner that will provide a strong partnership and value proposition.
2. Younger agencies who have a core book of business and are now looking to take their agency to a new level, and understand they need to leverage partnerships in order to get the carriers and resources necessary to take it to the next level.

**Qualifications to Join Network:**

Minimum Premium/Revenue: \$1,000,000 in premium (will consider new with experience)

Employee Count: n/a

Other Criteria: Must have strong business plan, experience in area of focus, emphasis on growth, looking for true partnership.

**Membership Coordinator:**

- Melissa Smyt
- Director – Affiliate Strategy
- melissa@oilins.com
- 213-438-0174

**Address:**

1350 Carlback Avenue  
Suite 100  
Walnut Creek, CA 94596

**Email Address:**

johnpjr@oliins.com

**Phone Number:**

925-295-2510

## PIIB

**Year Established:** 1994

**Agency Members:** 240

**States Agency Operates In:**

AZ, CA, CO, ID, NV, OH, OR, TX, UT, WA

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

Our network is a solution for experienced Independent Agents. For \$850 a month, we offer direct market access, 100% commission and pay 90% of profit sharing. We provide networking opportunities, education conferences as well as an annual convention. PIIB is investing in technology and has an interactive affiliate only portal full of carrier information. Within the portal we have a market search forum as well as a perpetuation platform designed to connect agency Principals interested in buying, selling, M&A. The collaboration of top-notch agents, our carrier relationships and direct access model set us apart from other organizations. At PIIB we highly regard transparency and have nothing sticky in our contract. If you ever needed to leave the group, the only requirement is a 90 days' notice and we release your codes.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

- Access to PIIB Match
- Assistance in Perpetuation Plans
- Access to PIIB Connect - Market Search Tool
- Collaboration Events
- Security in Profit Sharing
- Vendor Discounts
- Education Summit & Annual Convention

**Top Commercial Lines Carriers:**

Chubb  
CAN  
Hartford  
Liberty  
Nationwide  
Travelers

**Top Personal Line Carriers:**

Mercury  
Nationwide  
Safeco  
Travelers

**Special Programs or Coverages:**

**Product Mix:**

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

**Ideal Agency Candidate:**

PIIB introduced the “WOW Agency” term a few years ago, we are proud to have the best agencies affiliated with PIIB. With that, we are looking for agencies that will grow profitably with our companies and work in a collaborative way with other PIIB affiliates. WOW agencies are not satisfied with the status quo, they are passionate about improving their agencies every day. We will work with startup agencies or existing agencies.

**Qualifications to Join Network:**

At least 1 year of captive experience.

**Membership Coordinator:**

- Tracy Ryan
- Agency Relations
- tracy@piib.com
- 916-941-0518 ex. 102

**Address:**

5072 Hillisdale Circle  
El Dorado Hills, CA 95762

**Email Address:**

tracy@piib.com

**Phone Number:**

916-941-0518

## Premier Group Insurance

**Year Established:** 1999

**Agency Members:** 400+

**States Agency Operates In:**

AL, AZ, AR, CA, CO, CT, DE, FL, GA, ID, IL, IA, KS, KY, LA, ME, MD, MA, MN, MS, MO, MT, NV, NH, NJ, NM, NC, ND, OH, OK, OR, PA, SC, SD, TN, TX, UT, VT, VA

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

PGI's Vision: To be the Dominant Provider of Meeting and Exceeding Independent Agency Needs.

PGI's Mission: To be the Absolute BEST at Helping Member Agencies Profitably Grow by Exceeding their Needs to Help Them Maximize Opportunities with Prospects, Policyholders and Carriers.

**Premium Controlled by Network:**

< \$25 million

**Services and Resources:**

- Agency Conversion Process
- Agency Accounting
- Agency Onboarding
- Agency Licensing
- Best Business Practices
- Carrier Appetite
- Commercial Lines Market Access
- Personal Lines Market Access
- Personal Lines Service Center
- Commercial Lines Sale Center
- Insurance Soup Partnership

And much more!....

**Top Commercial Lines Carriers:**

BTIS  
GUARD  
Hartford  
USLI

**Top Personal Line Carriers:**

Nationwide  
Progressive  
SafeCo  
Travelers

**Special Programs or Coverages:**

- Higher commission than average street level - as high as 25%
- Year End Bonus and Profit-Sharing
- Fastest Commission Payout (Next Month)
- Guaranteed, Buy, Sell, Transfer Ownership Options No PGI minimum production requirements  
\*Carrier productions requirements apply!
- Customer Care Center available – (optional) Advanced Marketing Strategies for Premier Partners
- “Playbook for Success” Step by step game plan to Financial Success
- EQUITY & GUARANTEED BUY-BACK OF BUSINESS

**Product Mix:**

Property & Casualty %: 90

Life %: 5

Annuity/Investments %:

Health %: 3

Other %: 2

**Ideal Agency Candidate:**

- Premier Group is looking for serious, committed agents that are seeking a career path to success in the Independent Agency Channel. All candidates must have:
- 100% Focused Commitment to open a New Business
- Possess a valid in good standing Property & Casualty license in their state of domicile.
- Be of good character, conducting their business affairs in an ethical and professional manner.
- Ability pay a low, one-time system activation fee of \$2,750.00.
- Be willing to learn and utilize the tools and support that come with being a Premier Group Partner. Dedicated Retail, Professional, Office Space-Location\*

\*Denotes state specific and/or carrier requirements.

**Qualifications to Join Network:****Membership Coordinator:**

- David Colvin
- Business Development Director
- davidc@pgiagents.com
- 720-457-1101

**Address:**

600 17<sup>th</sup> Street  
Suite 1425 N  
Denver, CO 80202

**Email Address:**

notifications@pgiagents.com

**Phone Number:**

720-457-1101

## Renaissance Alliance

**Year Established:** 1999

**Agency Members:** 85

**States Agency Operates In:**

CT, FL, ME, MA, NH, NY, RI, VT

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

A rich infrastructure of services, support and expertise to fuel the growth of member agencies.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

**Top Commercial Lines Carriers:**

Chubb

Hanover

Hartford

Liberty Mutual

Philadelphia

Travelers

**Top Personal Line Carriers:**

Hanover

Main Street America

Mapfre

Plymouth Rock

Preferred Mutual

Quincy Mutual

Safety

**Special Programs or Coverages:**

**Product Mix:**

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

**Ideal Agency Candidate:**

**Qualifications to Join Network:**

A burning desire to grow.

**Membership Coordinator:**

- Leanne Ross
- Senior Vice President, Agency Recruitment
- [Leanne.ross@renaissanceins.com](mailto:Leanne.ross@renaissanceins.com)
- 781-431-9800

**Address:**

981 Worcester Street  
Wellesley, MA 02482

**Email Address:**

[Leanne.ross@renaissanceins.com](mailto:Leanne.ross@renaissanceins.com)

**Phone Number:**

781-431-9800



## 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, AR, AZ, CA, CO, CT, DE, FL, GA, ID, IL, IN, IO, IA, KS, KY, LA, MD, MA, MI, MN, MS, 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

## The Insurance Alliance Network

**Year Established:** 1997

**Agency Members:** 10

**States Agency Operates In:**

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

Our P&C network is designed for agencies with more than \$1 M in P&C revenue that are growth and profit-oriented.

**Premium Controlled by Network:**

> \$250 million

**Services and Resources:**

Profit sharing, bonus opportunities, advice, support and training, vendor discounts.

**Top Commercial Lines Carriers:**

**Top Personal Line Carriers:**

**Special Programs or Coverages:**

**Product Mix:**

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

**Ideal Agency Candidate:**

**Qualifications to Join Network:**

**Membership Coordinator:**

- Jane Koppenheffer
- President
- jkoppenheffer@theinsurancealliancenenetwork.com
- 717-230-1910

**Address:**

3425 Simpson Ferry Road  
Suite 101  
Camp Hill, PA 17011

**Email Address:**

jkoppenheffer@theinsurancealliancenenetwork.com

**Phone Number:**

716-373-5511



## 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:**

AL, AZ, AR, 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:**

- Gordy Bunch
- Chairman, President, CEO
- gordy@twfg.com
- 281-466-1123

**Address:**

1201 Lake Woodlands Drive  
Suite 4020  
The Woodlands, Texas 77380

**Email Address:**

gordy@twfg.com

**Phone Number:**

281-367-3424

## 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 million - 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

