

PIA National Guide to **Member Benefits**



Business-building tools

Commercial Lines Market Access. No cost program featuring 17 nationally recognized “A-rated” carriers for Workers’ Compensation & Business Owners Policy Insurance. pianational.org/clmarketaccess

Rainbow Insurance. Specialized Business Owner’s Policies (BOP) and Excess Liability coverage, specifically designed for restaurants and beauty & wellness businesses. pianational.org/rainbow

PIA DMV: PIA’s Direct Marketing Vault. A one-stop shop for direct mail and digital advertising services. Customizable postcard templates are available to use with the USPS Every Door Direct Mail Program and Targeted Direct Mail. Double your impact with add-on digital advertising services. pianational.org/piadmvmv

Marketing Support for PIA Members. Market your agency using PIA’s print advertisements, social media support, and consumer-facing marketing content for your clients and prospects. Plus a guide with tips from industry experts. pianational.org/marketingsupport

Disability Insurance. Breeze helps members sell disability insurance. With instant quotes, an online application process, and case management done for you, Breeze makes it easy to earn competitive commissions and grow revenue by offering top-rated disability insurance to clients. pianational.org/breeze

PIA Logo and Signature Block for Members. Showcase your credibility as a professional independent insurance agent — use the PIA member logo on business cards, signage, promotional materials, and more as well as the PIA signature block in your emails.

Rough Notes Advantage-Plus. Helps identify risk exposures and provides detailed coverage analysis for C/L and P/L. Save \$200/year with PIA member discount. pianational.org/roughnotes



Insurance products

Group Insurance Products. PIA members can choose from several high-quality, competitively priced insurance plans to help protect you, your employees and families:

term life insurance, short term disability, long term disability, and AD&D. piatrust.com

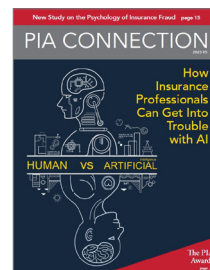
PIA Agents Umbrella Program. Excess insurance protection includes E&O and business liability coverage, with available endorsements for EPLI and personal coverage. Coverage not available in all states. pianational.org/umbrella

Cyber Insurance. PIA is proud to offer robust coverage tailored to small and mid-sized businesses. Coverage is available for you to purchase and also to sell. pianational.org/cyberinsurance



Cutting-edge Communications

PIA Connection Magazine. Award-winning publication providing PIA analysis from the agent’s perspective. pianational.org/piaconnection



PIA Advocacy Blog. Timely updates about what’s happening on Capitol Hill and on state and federal regulatory issues. PIAAadvocacy.com

PIA in the News. PIA is the go-to, authoritative source for the independent agent’s point of view across a wide swath of influential industry media.

PIA Tech Council

Learn about new solutions to help your agency grow through the PIA Tech Council, a council of technology leaders and solution providers who will provide ideas, input, and insights on technology and agents to PIA and PIA leadership. pianational.org/techcouncil

The PIA Partnership

The PIA Partnership is a joint effort of leading insurance carriers and PIA. PIA and the companies belonging to the partnership work together to develop hands-on tools for PIA members. pianational.org/piapartnership

Winning@Work. What do Gen Z producers and CSRs want from agency employers? This report helps agency owners and principals identify ways to appeal to and motivate rising leaders by focusing on five key areas: culture, growth, flexibility, mentors, and technology. pianational.org/winningatwork

Winning@Customer Retention. Designed to help you improve customer service and retention with resources to track client retention rates, segment, and communicate with your customers. pianational.org/customerretention

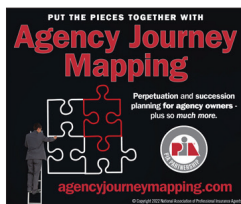
Winning@Cybersecurity Defense. An action-oriented educational resource created to teach you and your clients about the most common cyber dangers faced by small and mid-sized businesses as well as the best business practices and insurance coverages that can reduce these risks. pianational.org/cybersecurity

Winning@Virtual Sales and Service. Modern agents must be prepared to sell and service virtually. This program addresses how your agency should transform themselves to take advantage of modern technology and changing consumer expectations caused by changes in technology. pianational.org/winningatvirtual

Ready For Everything. This hub brings together resources for crisis planning and preparation, so that you can survive any crisis. pianational.org/readyforeverything

Winning@Talent. Your guide to hiring, motivating, and retaining the best agency employees. pianational.org/winningattalent

Agency Journey Mapping. Value your agency, maximize your retirement income, and plan for unexpected death/disability while creating a perpetuation plan for your agency. pianational.org/agencyjourneymapping



Small Commercial – the Digital Opportunity. A variety of resources that help you increase your digital capabilities and improve the digital experience for your customers. pianational.org/digital

Classic PIA Partnership Programs: Less recent (but still relevant) programs including Reaching Gen Y, Closing the Gap, Agency Touchpoints and Practical Guide to Succession Planning. pianational.org/classicprograms

Agency Management Tools

PIA 401(k). The PIA 401(k) plan is easy to administer, offers minimal fiduciary responsibility, is low-fee and low-cost. It has you covered by performing over 90% of administrative tasks and becoming your retirement department support team. pianational.org/401k



PIA Ascend. Simplifying payments to increase customer retention and team efficiency - improving your agency's bottom line. pianational.org/ascend

PIA Blueprint for Agency Success. Your 3-part resource guide for business planning, growth strategies, and agency continuity. pianational.org/blueprint

ACORD Forms End User Licenses. Available for free if you qualify and access ACORD forms through agency management systems and other authorized distributors. Plus PIA member discounts on the ACORD Advantage Plus Program. pianational.org/acord

Agency Agreement Review Service. Free to you and carriers, PIA recommends changes to carriers and highlights concerns for members so you can make informed decisions about the agreements you sign. pianational.org/agreementreview

Hire with IdealTraits. The comprehensive, go-to hiring tool to help you hire top performers. pianational.org/idealtraits

Employee Profiling. Hire the right people with skills and personality testing from OMNIA. pianational.org/omnia

The Agent Experience. Practical information and resources to help you develop and grow customer relationships online. pianational.org/agentexperience

Free subscriptions to industry publications.

Top Tier Education.

PIA members have access to and receive member pricing on pre-licensing courses, continuing education courses, and designation classes including the Certified Professional Insurance Agent (CPIA) program.

Legislative & Regulatory Outreach

PIA National represents members' interests in state capitals and in Washington, D.C. to ensure that lawmakers and regulators understand and support the independent agency system. That's why PIA actively works with Congress and the Executive branch to ensure that your voice is heard when policymakers make decisions that impact you.

PIA has one common strategy: always put the interests of agents first! Whether it's fighting overreach by the Federal Insurance Office, standing up for agent commissions, protecting the vital role that independent agents play in delivering federally-backed crop and flood insurance, protecting small business owners against tax increases, and opposing a ban for noncompete clauses, PIA is your advocate in the halls of Congress, with regulators, and throughout our industry.

In addition, PIA works with Congress on other priority issues like cybersecurity, data security legislation and the Terrorism Risk Insurance Act (TRIA). PIA National's advocacy also extends to important organizations like the National Association of Insurance Commissioners (NAIC), state lawmakers through the National Council of Insurance Legislators (NCOIL) and InsureTech standards groups like the Association for Cooperative Operations Research and Development (ACORD), and others – to ensure that the concerns of independent agents are addressed. **Here are some ways you can get involved:**

PIA Advocacy Blog. The PIA Advocacy blog is your one-stop shop for timely updates on what's happening on Capitol Hill and on state and federal regulatory issues. Follow the blog by visiting: PIAAadvocacy.com

PIA Advocacy Day (formerly the Federal Legislative Summit). Every year PIA members gather in the nation's capital to meet with their elected representatives to discuss issues that are important to independent insurance agents. PIA Advocacy Day gives policymakers and their staffs a chance to hear directly from you, their constituents. Learn more by visiting: PIAAadvocacyDay.com

Grassroots Alerts. To ensure legislators hear the concerns of their constituents, PIA occasionally organizes grassroots campaigns in which PIA members can easily send prewritten, fully-editable letters directly to their elected officials. Send one now by visiting: piagrassroots.com



PIA Political Action Committee (PIAPAC). PIAPAC is the Professional Insurance Agents Political Action Committee. The PAC contributes to the campaigns of candidates to federal office who share our pro-insurance, pro-business perspective and who support our issues. PIAPAC is funded by the contributions of individual PIA members. To learn more visit: piapac.com





PIA Insurance Foundation

The Professional Insurance Agents Insurance Foundation (501(c)(3)) strives to further the insurance knowledge and education of those engaged in the independent insurance agency system with the PIA Education Fund. It is also home to the PIA Disaster Relief Fund which solicits charitable contributions and, in turn, provides relief grants to businesses following catastrophic events. pianational.org/insurancefoundation

CONTACT US

Have a question? Not sure how to access a particular program?
That's what your staff at PIA is for.
Please contact us using the information to the right.

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-  facebook.com/PIANational
-  [@PIANational](https://twitter.com/PIANational)
-  linkedin.com/company/pianational
-  instagram.com/pia_national

Connect with other PIA members

Join the PIA Peers group on Facebook



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