

WWW.AWIA.COM

awia@vcn.com
 PO Box 1321
 Cheyenne, WY 82003
 307-201-4801

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!!!Convention Registration!!! August 31- Sept. 2, 2021



Lela Ladd, CIC, LUTCF — AWIA President



**Lela Ladd
President**

I love Spring in Wyoming! This year seems to be more beautiful because of the “opening” of our nation from the COVID restrictions. We have learned to be thankful for things we used to take for granted, like in-person meetings, social events, and open rest areas. As we look to the future and anticipate travel for

vacation as well as for work, it seems almost impossible to fit it all in when we are trying to make up for lost time.

One of the side effects of this past year is the reality that working from home is more doable than previously thought. What effect will this reality have on business in our state? Will we see a change in how we insure businesses that have employees who now can work from home and the office? In my company, the way we are explaining the reality is now we have “hybrid” office workers. They work in the office three days a week and at home two days a week. We have found, along with the rest of the nation, that there is value in both locations. Working from home tends to reduce the “office politics” and increase the production. Working from the office

tends to build relationships, helping with retention. It is amazing how we can adjust to what life throws at us, coming out ahead of where we entered.

So, how will this new reality affect your business? At the very least, it will open up a new conversation that identifies potential gaps in coverage. When we are forced to look at life in a new way, the growth that takes place is encouraging. Embrace the good and shed the bad.

Convention 2021

REGISTRATION Enclosed

Is scheduled for

**August 31- Sept 2,
2021**

at the Ramkota Hotel



Adam Luce, AAI - PIA National Director

PIA National had great success with their platform on Advocacy Day was very effective in getting PIA leaders in face to face (via zoom) with our respective Members of Congress. I believe Advocacy is the core purpose of our State and National organizations. PIA National combined that core purpose with its newest commitment to

bring the best emerging technology to its members. That said, I look forward to next year and the hope that we will be able to resume in person Advocacy as there is no substitute for in person visits.

Our Representatives are usually very receptive to our concerns and they tend to com-

(Continued on page 2)



Partners
2020-2021

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(Title Sponsors)

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**Great Plains
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**Progressive
Insurance**

Genesee



**Brad Jackson
IIABA NATIONAL
DIRECTOR**

ed - and often brought up federal Intrusion into state insurance regulations; securing a long-term flood insurance reauthorization, concerns with the PRO act (H.R. 842) - that affects the nation's labor laws; defending the federal crop insurance program (FCIP); properly responding to future pandemics - whether it is implementing either the PRIA or BCPP; and lastly to advocate for independent agents and their role insuring the cannabis-related industry. Put quite simply, the conversations were a good starting point, and well received by all.

I am very much looking forward to our upcoming convention, and seeing you all in person after a long 2020 and no convention! This convention should be one of the best at-

Hi Everyone, hope this finds you doing well, staying healthy, and getting ready for another wonderful Wyoming summer!

Your AWIA group had some great conversations with Senators Barrasso, Lummis, and Representative Cheney recently, and addressed some issues that are quite important to our industry.

Brought up and discussed were the Main Street Tax Certainty Act (S. 480 / H.R. 1381) - which affects S-corp taxes; the unwarrant-

tended in recent history - folks are ready to get out, do some networking, and have fun!

Personally, I don't feel there is any better value for you as an agent, or our state association, than our convention! The time we can spend with our current carriers and vendors, our future carriers and vendors, and of course your fellow independent agents is invaluable.

Please plan on attending, even if it is for only part of the convention, we need you there!

All my best, Brad Jackson, SND



PIA National Director's Report (cont.)

(Continued from page 1)

mit to voting on our behalf. I felt we made a good impact on 2021, and maybe next year some more of us might participate in in person visits?

New website and logos have been rolled out for PIA I will share more on these developments in the near future.

I know you won't regret using

the PIA Hartford Flood program, not only do you get great commissions for your agency, but the Association benefits as well.

Looking forward to seeing everyone at our state Convention in August!

As part of **PIA's ongoing partnership with The Hartford's flood insurance program**, we are proud to provide PIA members with the latest [Flood Agent eNewsletter](#) produced by The Hartford for its flood insurance agents.

In addition to The Hartford's eNewsletters, PIA members visiting [PIA's Flood Insurance Marketing Support Center](#) can download flyers to help their clients prepare for floods, deal with the aftermath of flooding, and how to prepare for a visit by an adjuster. PIA thanks The Hartford for these excellent materials. www.pianet.com for more information.



Ken Hauck, CIC, ARM, CPIA—EVP report



in Casper.

Convention 2021. Sounds good, right? Different month than usual, but definitely a convention. This will be our 88th Annual Convention of Wyoming insurance agents and the 25th Anniversary of AWIA.

Insurance company representatives are already registering (as I write this we have four booths and one golfer already registered).

Tuesday, August 31 will be CE day. We have 7 hours of CE

lined up, thanks to Breckenridge Insurance Services.

Cyber Ins.—2 hours, Energy Liability—2 hours, and Ethics—3 hours.

Convention CE is free to AWIA members and their employees.

Wednesday, Sept 1 we have the usual Day of Fishing/picnic at Lake Alcova, golf at Three Crowns at 10:00 am, and the Trade Show at 5:00 pm, followed by Casino night at 8:00 pm.

Thursday, Sept 2, we start with Breakfast with the Commissioner, CE from the Department of Insurance, Legislative Forum, the Annual Meeting, Luncheon with Make-A-Wish, a reception, Awards Banquet, and entertainment by Dave Munsick, “The Song Teller” from Dayton, WY.



Daniel York — Past-President



Wyoming Legislative News:

Notary bonds will no longer be required due to the passage of **SF0029: Revised uniformed law on notarial acts**. This bill was part of an overall re-writing by the Secretary of State’s office of the Notarial Statutes to conform with modernization (e.g. virtual notary activity) spreading across the industry. **You can still sell Notary Bonds**, and in **higher limits** if your client wants higher limits, so use your usual due diligence to eliminate an E&O exposure based on limits.

As an organization, **we opposed** several bills and none of them got through the Corporations committee. **HB0119: Investigation of auto insurance claims** would have eliminated partial payments to get the claims process started. We suggested that this bill would slow down the entire claims process. **HB0199: Vehicle insurance anti-stacking prohibition** (see that double negative) would have allowed for the stacking of UM/UIM if you insured more than one auto. We suggested that this bill this would increase the cost of insurance for those with multiple insured vehicles, since insurance companies do not offer “free” higher limits. In addition, people do have a choice on their limits if they want more.

Our Federal Legislative activity was virtual this year. We did visit with Senators Barrasso and Lummis and Representative Cheney. They were very open to our discussion. **We supported** Future Pandemics Funding, Small Business Tax Fairness, Reauthorizing Long-term Flood Insurance, Federal Crop Insurance (as is) and Cannabis Safe Harbor for insurance agents. **We opposed** the Federal Insurance Office and the PRO Act, which re-defined “independent contractors” and would force them to become employees.

Trusted Choice[®] is Going Primetime

See your national brand at work: Watch **Billion Dollar Buyer** on **CNBC Primetime, 10PM ET.**

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The Commissioner's Corner

Jeffrey P. Rude



Wyoming Department of Insurance

Legislative and Administrative Rules Update

66th Wyoming Legislature

The following descriptions of Legislation passed by the 66th Wyoming Legislature are intended to provide an overview of the bills that were passed during this session and not as a complete interpretation of the legislation. The bills are listed with their assigned House Bill (HB) or Senate File (SF) number and catch title. The enrolled acts can be found as the House Enrolled Act (HEA) or Senate Enrolled Act (SEA) at the respective listed chapters. Readers are encouraged to read the bills in their entirety and seek counsel for legal interpretations.

HB0007 – Air ambulance membership organizations

-Regulates air ambulance membership organizations and specifies that memberships are not disability (health) insurance. Air ambulance membership organizations are organizations that offer memberships where persons can pay fees or dues in exchange for discounted air ambulance service or access to discounted service from other air ambulance providers. This act provides for the regulation of air ambulance membership organizations by the Insurance Commissioner and requires organizations to seek a certificate of registration from the Commissioner before operating in Wyoming and requires renewal certificates. The Insurance Commissioner may suspend or revoke a certificate of registration if an air ambulance membership organization misrepresents its services, engages in unfair practices, or fails to fulfill its obligations to members. The Commissioner may impose a civil penalty or issue a cease-and-desist order. The act specifies what fees and charges an air ambulance membership organization may charge to its members and requires organizations to provide certain notices and disclosures to members and prospective members regarding memberships that the organization offers and imposes requirements on the advertisements of air ambulance membership organizations.

HEA No. 0075, Chapter 125. Effective 7/1/2021.

HB0111 - Access to anatomical gifts and organ transplants

-Prohibits discrimination for an anatomical gift, organ transplant or related treatment against a person based on a person's disability. This act applies to both insurance coverage and medical care and prohibits discrimination in the provision of health care services and insurance for organ transplants and related procedures based on a person's disability. Insurance coverage of an anatomical gift, organ transplant or related treatment shall not be denied, refused to be renewed or include reduced coverage benefits due to a person's disability. Insurance providers also shall not incentivize a medical provider not to perform an organ transplant or related treatment on a

person with a disability. The act requires a provider to make reasonable modifications to its policies, practices, or procedures to allow a person with a disability access to transplantation related services. A disability may be considered in instances of insurance and medical treatment if it makes the provision of an anatomical gift, an organ transplant or similar treatment medically significant or medically inappropriate.

HEA 0027, Chapter. 35. Effective 3/30/2021.

SF0014– Credit for reinsurance

-Updates Chapter 5 of the Insurance Code which relates to Credit for Reinsurance. This is a National Association of Insurance Commissioners (NAIC) model law and is required for the Department to maintain its NAIC Accreditation. This update was also needed for the Department to comply with international agreements and to avoid federal preemption. This legislation allows Wyoming domestic insurers to take credit for reinsurance that is ceded to reinsurers that are domiciled in Reciprocal Jurisdictions provided those reinsurers meet certain requirements, including specified capitalization levels. Reciprocal Jurisdictions are defined in the bill and include those jurisdictions that have signed a covered agreement with the U.S., including the EU and the UK. Reinsurers domiciled in Reciprocal Jurisdictions will not be required to post collateral provided they are in compliance with specified requirements. An administrative rule to accompany this legislation is also in progress.

SEA 0007, Chapter 25. Effective 7/1/2021.

SF0015 Temporary licensing and permitting authority

Although this statutory change does not explicitly address the Insurance Code, Wyo. Stat. § 33-1-303 is applicable to any board authorized to establish examination or license fees for any profession or occupation regulated under Title 33. Pursuant to the statutory changes implemented in 2018, the insurance industry is regulated under Title 33-1-304 which is applicable to agencies or licensing boards who consider criminal convictions as part of its regulatory duties. Since there are regulatory provisions in W.S. § 33-1-304 that are specifically applicable to provisions of the Insurance Code, the changes to W.S. § 33-1-303 may apply to the insurance industry as well. Under W.S. § 33-1-303, a licensing entity may waive or modify statutory examination or continuing education requirements, or other statutory requirements for licensure if the examinations are not being given, continuing education opportunities are not available, or the statutory requirements could not be met. The Department expects this statutory change to have little effect on the licensing activities of the Department because of steps being taken to offer online continuing education and online proctoring of examinations.

SEA No. 0063, Chapter 136. Effective 4/6/2021.

SF0029– Revised uniform law on notarial acts

-Repeals existing laws on notaries and notarial acts and creates new laws based on the Revised Uniform Notarial Act, existing Wyoming law and Wyoming-specific changes recommended by the Secretary of State's Office. The act provides definitions, increases related fees, allows for remote online notarization and remote ink notarization, provides education requirements, requires rulemaking, provides for recognition of foreign notarial acts, requires a journal of notarial acts to be kept by the notary and otherwise provides for the regulation of all notarial acts in Wyoming.

SEA 0010, Chapter 29. Effective 7/1/2021.

SF0052– Insurance mental health and substance use parity

-Prohibits any individual or group health insurance contract issued in Wyoming from denying coverage for a mental health or substance abuse service that is delivered using a remote audio or audio-visual system if that same service would be covered if it was delivered in-person; charging a copayment, deductible or coinsurance amount to a person receiving mental health or substance use services through remote audio or audio-visual delivery systems that is higher than the amount charged for the same service delivered in-person; reducing any payment or reimbursement provided to a health care provider for the provision of substance use or mental health services using remote audio or audio-visual delivery systems to less than what would be paid if the services were rendered in-person. **Note: The act applies to all insurance policies and plans delivered, issued, renewed, modified, amended or extended on or after December 1, 2021.**

SEA 0045, Chapter 83. Effective 4/5/2021.

SF0112 - Insurance discount for accident prevention training

-Repeals the requirement for a motor vehicle insurer to allow, and for the Department of Transportation to approve insurance discounts upon an insured person who is at least 55 years of age, completing accident prevention training.

SEA No. 0064, Chapter 138. Effective 7/1/2021.

Administrative Rules Update

During the last year, the Department of Insurance updated its rules and regulations for Chapter 35- Medicare Supplement Insurance. The update was necessitated by the Medicare Access and CHIP Reauthorization Act of 2015 (MACRA) (PL. 114-10) which was signed into law on April 16, 2015. This legislation amended Title XVIII of the Social Security Act of 1935, 42 USC, Ch. 7, and the Balanced Budget Act of 1997 (PL. 105-33). The primary provisions of MACRA include streamlining the way Medicare physicians are reimbursed, increasing funding, and providing additional options for Medicare Supplement plans available to consumers.

The Department is continuing to update its existing rules and regulations and will be implementing new regulations as required by recent legislation. Please continue to monitor the Department's administrative rules updates through the Secretary of State's website. If you have any questions regarding how to monitor regulatory updates through the Secretary of State website, please contact the Secretary of State's office or the Department of Insurance.





Education Corner

Virtual University

Look for the CE approved **live webinars** from the **Big "I" Virtual University** on AWIA's website. Eight different 2 hr. classes and one 1 hr. class are approved. Each class will be presented about 12—20 times in the year 2020.

NEW!

Pre-Licensing

Training material from **Exam FX** is on AWIA's website including securities.

ABEN

CE courses continue to be offered **on-demand** for those of you who want more flexibility with your schedule. There are **nine different classes** (two qualify for a **10% discount** for your Westport E&O policy).

www.awia.com

Visit our Education Section in the web site to browse our course listing and sign up for the classes you need!

Convention CE is free to AWIA members and their employees.

Thank you to Breckenridge Insurance Services





AWIA



87th Annual CONVENTION Aug 31 – Sept 2, 2021 25th Anniversary of AWIA Ramkota Hotel - Casper, WY

Member Agent Full Registration ----- \$225.00
2nd Registration same Agency or Spouse ----- \$150.00

Company Representative ----- \$225.00
(Registration includes all Meals, Receptions and Continuing Education)

Agency/Company Name: _____

Name on Badge-title/designations _____

Address _____ City/State/Zip _____

Phone _____ E-mail _____

Method of Payment: (circle one) Check enclosed Credit card, info below

Name on Card: _____ Card Number _____

Billing Address of card:

Expiration Date _____ Security Code (3 or 4 digits) _____

Refund Policy: Cancellations received by 08-01-2021 will be given full refund, NO refunds after that date.

AWIA Convention Room Rates \$89.00 at Ramkota Hotel, Casper – Call 307.266.6000

Complete and return form to awia@vcn.com or mail to
Association of Wyoming Insurance Agents
PO Box 1321
Cheyenne, WY 82003

AWIA Convention 2021

Which Events do you plan to Attend?

Tuesday, August 31

() 9:30 am - 11:30 am: [2 hours CE, “Cyber at the Speed of Light” Sponsor: Breckenridge Insurance Services](#)

AWIA members, sponsors, partners and exhibitors - \$0; non-members - \$40

() 1:00 pm - 3:00 pm: 2 hours CE, “**Energy Liability**” Sponsor: Breckenridge Insurance Services

AWIA members, sponsors, partners and exhibitors - \$0; non-members - \$40

() 3:00 pm - 6:00 pm: 3 hours CE, “**A question of Ethics**” Sponsor: Breckenridge Insurance Services

AWIA members, sponsors, partners and exhibitors - \$0; non-members - \$40

****Exhibitors can set up booths at any time throughout the day on Tuesday or Wednesday****

Wednesday, September 1

8:00 am - 5:00 pm: Registration and Exhibit Booth Set up

() 9:00 am - Fishing/Pontoon/Fun Day at Alcova Reservoir: 9:00 am depart hotel lobby ~ separate regis. \$60

() 10:00 am - Golf: Tee time at the Three Crowns Golf Club ~ separate registration \$120

() 5:00 pm - Trade Show and Company Appreciation Night

(Single event price \$75, group pricing available, food and drinks included)

8:00 pm - Casino Night- Everyone is welcome - no charge. Door Prizes. Silent Auction.

Thursday, September 2

7:00 am - Registration opens

() 8:00 am - Breakfast with the Commissioner in Exhibit Hall (single event price \$35)

() 9:30 am - 10:45 am - Wyoming Legislative Panel

() 11:00 am - 12:00 noon - 1 hour CE, provided by DOI (free to the public)

() 12:15 noon - 2:00 pm ~ Luncheon (single event price \$35)

() 2:30 pm - 3:30 pm - AWIA Agent’s Only Annual Meeting followed by the new Board of Directors Meeting

() 3:30 pm - 5:00 pm ~ TBD

() 6:00 pm ~ Reception (all evening events for one single price \$75)

7:00 pm - Awards Banquet (all evening events for one single price \$75)

8:00 pm - Dave Munsick - “The Song Teller” ~ you don’t want to miss this. Dave is from Dayton, WY.

Gregg Jackson Memorial Fishing Event

Wednesday, September 1, 2021

Day at the Lake, Fishing & Fun Registration

Name _____ Company _____

Fun Day/Fishing at ALCOVA Marina (30 minutes west of Casper)

FEE: \$60 INCLUDES LUNCH

MY CHECK IS ENCLOSED []

Fishing Committee

Make payable to:

Daniel York

AWIA

Trudy Lawrence

PO Box 1321

Sherri Wilkinson

Cheyenne, WY 82003

I WOULD LIKE TO PAY BY CREDIT CARD []

Credit Card Payment

Name on card _____

Billing Address of Card _____

City, State, Zip Code _____

Credit Card number _____

Expiration _____ Security Code (3 or 4 digits) _____

E-MAIL ADDRESS _____

Enjoy a relaxing fun day at the Lake cruising, fishing & picnic.

A 10-person pontoon is booked for the day.

If you fish, you must have a Wyoming fishing license.

2021 Golf Committee

2021 AWIA Convention Golf Tournament

Tony Schebler

Ken Hauck

CONTACT:

Ken Hauck

M: 307.274.6119

O: 307.201.4801

*** Mailing Address**

AWIA

PO Box 1321

Cheyenne, WY 82003

307.201.4801

* Send Entry Forms & payment to this address

-or-

Email forms and

CC payment:

awia@vcn.com

-or-

Call AWIA at 307-201-4801

Goody bag items are welcome if you have them!

- DATE:** September 1, 2021
- TIME:** Registration at 9:00 PM. T-times start at 10:00AM
- PLACE:** Three Crowns Golf Club
1601 King Blvd.
Casper, WY 82604
- ENTRY FEE:** \$120.00 per player (includes: green fees, cart & box lunch)
Payment due no later than August 20, 2020.
Send Check to AWIA, PO Box 1321, Cheyenne, WY 82003
- Format:** Tournament will be played in a four-person scramble format.
If you do not enter a team list, you will be placed with a team.
- Handicap:** Please submit your handicap or approx. score for 18-holes (to ensure teams are evenly matched)

ENTRY FORM:

NAME _____

Agency or Company _____

Phone _____ Email _____

Handicap or SCORE FOR 18-HOLES: _____

List Additional Team Members if sponsoring the team:

Player 2 Name: _____ HDCP _____

Agency or Company _____

Phone _____ Email _____

Player 3 Name: _____ HDCP _____

Agency or Company _____

Phone _____ Email _____

Player 4 Name: _____ HDCP _____

Agency or Company _____

Phone _____ Email _____

Credit Card Payment



Event: 2021 Convention Events

AMOUNT TO CHARGE ON CARD _____

Name on card _____

Address for this card _____

City _____

Zip Code _____

Amount to be charged _____

Credit Card number _____

Expiration _____ 3 or 4 number Security code _____

Signature _____ Date _____

CENTURIES OF ROUGH NOTES

Rough Notes magazine, October, 1896


ROUGH NOTES

Entered at the Post office, Indianapolis, Ind., as second class matter.

A MONTHLY JOURNAL OF INSURANCE, THE INDUSTRY, AND LITERARY MISCELLANY.

Vol. XVIII.

INDIANAPOLIS, OCTOBER, 1896.

No. 12

LOCAL AGENTS ORGANIZE A NATIONAL ASSOCIATION.

The National Association of Local Fire Insurance Agents held its preliminary meeting at the Great Northern Hotel, Chicago, on September 29th, and completed its organization on the 30th. All local fire insurance agents are eligible to membership, and the annual dues are fixed for the present at \$1. There were delegates present from thirteen States.

Its objects, as set forth in the constitution and by-laws adopted, are: "To support right principles and use our influence to correct bad practices in fire underwriting."

The grievances the association will listen to with greatest interest are likely to relate to lack of discipline among local agents, multiple agencies, and overhead writing. Each State will be entitled to five delegates. It is proposed now to effect State Associations in every Commonwealth, whose members shall be men engaged in the local business. Robert S. Brannen of Denver is Organizer.

The next session will be held on the second Tuesday in May, at St. Louis.

The following officers were elected: President, A. G. Simrall, Covington, Ky.; First Vice-President, C. H. Woodworth, Buffalo; Second Vice-President, Milo E. Lawrence, Kansas City; Third Vice-President, Alfred Firtle, Louisville; Secretary and Treasurer, R. S. Brannen, Denver.

A. H. Robinson of Louisville is Chairman of the Executive Committee; Merwin Jackson, Toledo, Chairman of the Finance Committee, and B. L. Baldwin, Omaha, Chairman of Committee on State Associations. Mr. Brannen was nominated for President, but declined, for the purpose of doing work in the field and elsewhere as Organizer.

Associations of Local Agents are organized at present in Tennessee, Kentucky, New York, Virginia, and West Virginia, while Texas is organizing one. This idea will be promulgated, and Associations effected in various States as soon as possible.

The Rough Notes Company congratulates

The Independent Insurance Agents & Brokers of America
on their 125th Anniversary year

1896-2021 and beyond

(This article from 1896 does not continue.)



Big “I” accomplishments since 1896

April 2021

The Independent Insurance Agents & Brokers of America (or Big “I”), the nation’s oldest and most-respected association for P&C independent insurance agents, has stacked up many accomplishments and wins for our industry during the past 125 years. While it is difficult to point to just a few, here are examples of accomplishments by the Big “I” that have significantly improved the landscape for independent agents and brokers:

Ownership of Expirations: The Yonkers court case of 1903 was a pivotal moment for the Big “I” and the independent agency system as a whole. This case, won by the agents upon appeal, laid the cornerstone for the concept that an agent owns his or her expirations. The IABA financed the legal action through a voluntary fundraising effort, the first of its kind by the Association, spearheaded by H.W. Mandeville of New York. The Big “I” later worked with carriers to ensure that this concept was recognized as the standard in the industry. The independent agency system would not exist as it does today without the IABA’s win in the Yonkers case.

Opposition to Federal Regulation of Insurance: Over the years, the Big “I” has successfully defeated numerous attempts by the Federal government to regulate the insurance market. Whether it was the initial passage of the McCarran Ferguson Act in 1945 or calls for Federal Trade Commission oversight of insurance in the 1980s or for the so-called “Optional Federal Charter” and Treasury Department oversight in the 2000’s, the Big “I” has led the efforts to defend a modernized system of state insurance regulation.

Establishment, Extension & Reform of the National Flood Insurance Program, Federal Crop Insurance Program & Terrorism Risk Insurance Program: In those limited instances of private market failure where federal insurance programs are required, the Big “I” has been at the forefront in creating, extending, and reforming federal insurance programs that provide necessary markets for our members to best serve their clients. The Big “I” has also fiercely defended the private market role, particularly the IA system, in delivering those products to consumers and businesses.

IA Advocacy on Tax Policy: While it is said that tax policy is written in pencil and not pen due to its frequent changes, the Big “I” is consistently at the lead in advocating for changes that benefit its members. Most recently the Big “I” lobbied aggressively for passage of the 2017 Tax Cuts and Jobs Act (TCJA) which slashed taxes for Independent agencies whether organized as a C corporation or a pass-through. The provision for pass-throughs, supported by the Big “I,” added a section to the individual tax code that created a new 20% small business deduction. When the TCJA was signed into law it was unclear if insurance agents of all income levels would be able to take advantage of the deduction but the Big “I” successfully advocated for independent agents as regulations were drafted to maximize the deduction’s benefit for our members.

Continued on page 15

Defense of Incentive Compensation: In the mid-2000s, then-New York Attorney General Eliot Spitzer uncovered a bid-rigging scheme involving Marsh Inc., AIG, and other prominent industry names, and he and others used these allegations to argue that the receipt of incentive compensation by main street agents created an inherent conflict of interest and should be banned. The Big “I” forcefully and successfully defended the payment of contingent commissions and incentive compensation in legislatures and courts and before regulatory bodies while many in the industry stood aside or acquiesced to the strong-arm tactics of Spitzer and others. Some state officials and even some segments of our industry continue to attack these longstanding and legitimate forms of compensation, call for the creation of unnecessary disclosure mandates, and pursue the establishment of inappropriate and troubling standards of care for producers, but IABA’s defense of agents in this area persists.

Banks in Insurance Safeguards: After a long battle with the banking industry, the Big “I” secured safeguards to ensure banks cannot use credit tie-ins or other lending leverages to unfairly get the insurance business of banking clients. The Gramm-Leach-Bliley legislation includes the Big “I” sponsored safeguards for consumers and independent agents.

In addition to these and many other accomplishments, the Big “I” also:

- Was a leader in establishing ACORD, the industry’s premier provider and custodian of standardized insurance forms;
- Created the most widely recognized co-brand for independent insurance agents, Trusted Choice;
- Established TrustedChoice.com to provide an online portal to connect consumers with independent agents and help agents recapture market share from directs, after garnering significant investment from a number of national carriers;
- Secures year after year numerous improvements to ISO insurance policy forms through its Technical Affairs Committee;
- Is a leader in Diversity & Inclusion among member agents and state associations through its Diversity Council;
- Established Invest, which works tirelessly with carriers to attract new talent to the independent agent distribution channel;
- Established InsurBanc, the only national bank established by an industry trade association for independent insurance agents;
- Created the Best Practices program, which together with Reagan Consulting produces the Agency Universe Study, the most respected and valued study of its kind in our industry;
- Protects independent agencies in company appointment contracts via discussions and negotiations with carriers on the legal language in their appointment contracts; and
- Promotes independent agents and brokers via national advertising campaigns, with Raymond Burr in the 1980s and ‘90s, to campaigns on NBC, CNBC, Fox, CNN, ESPN, Weather Channel, and many more networks, along with social media and internet advertising campaigns.



YOUR MEMBER BENEFITS FROM PIA NATIONAL

BUSINESS-BUILDING TOOLS



Nicolette's pick

MARKETING REIMBURSEMENT PROGRAM. PIA is here to help with specific marketing tools PIA members can use and a \$250 reimbursement to help offset the cost!

www.pianet.com/agentsupport

- ◆ PIA DMV: PIA'S DIRECT MARKETING VAULT. Targeted direct mail and digital advertising campaigns. Turn-key yet highly customizable. www.piadm.com
- ◆ PIA BRANDING PROGRAM. Print ads, radio commercials, consumer-oriented flyers and social media support for PIA members. www.piabranningprogram.com
- ◆ PIA MARKET ACCESS. Access to over 50 national and specialty carriers, real-time online rating, ownership of your book and no exit fees for a low monthly rate. www.piamarketaccess.com
- ◆ HARTFORD FLOOD INSURANCE. PIA's endorsed flood provider since 2004. Dedicated local sales directors and book transfer/rollover team plus great commissions for PIA members. Call (860) 547-5006.
- ◆ PIA CYBER INSURANCE: Robust coverage tailored to small and mid-sized businesses. Coverage with special PIA-only enhancements is available for PIA members to sell.
- ◆ AVYST EFORMS WIZARD. Quickly and easily prepare ACORD, agency-specific, and carrier-unique applications and forms, entering data only once in an organized interview format. Get to market faster!
- ◆ FLOODBROKER.COM. Sell more flood insurance with a flood quoting Web portal. A PIA member exclusive!
- ◆ PIA AGENCY MARKETING GUIDE. Hands-on marketing tips from industry experts. Published annually.
- ◆ ROUGH NOTES - ADVANTAGE PLUS. Identifies risk exposures. Provides detailed coverage analysis. PIA member price \$600 annually (reg. \$700). Call 800-428-4384. Use your PIA member ID# above name on mailing label.
- ◆ AGENCY REVENUE TOOLS. Boost personal lines sales by engaging in employee worksite marketing using your appointed markets at regular commission rates.

- ◆ AGENCY WEBSITES. Cutting-edge websites tailored specifically to insurance agents.
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- ◆ **READY FOR EVERYTHING.** The online crisis resource hub for insurance agents.
- ◆ WINNING@TALENT. Your guide to hiring, motivating and retaining the best agency employees.
- ◆ AGENCY JOURNEY MAPPING. Value your agency, maximize your retirement income, and plan for unexpected death/disability while creating a perpetuation plan for your agency.
- ◆ CYBER 101. Cyber education for you and your clients.
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- ◆ CLOSING THE GAP—GROWTH & PROFIT. Plan for growth and profitability. Includes tools for improving retention, sales and account-rounding.
- ◆ AGENCY TOUCH POINTS—THE VOICE OF THE CUSTOMER. Give personal lines customers what they really want.

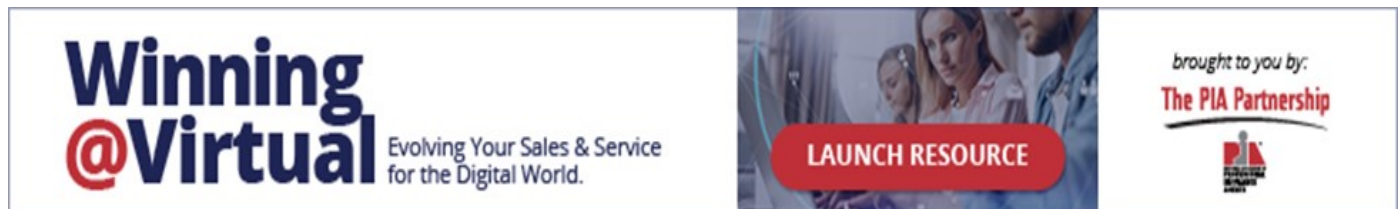
- ◆ REACHING GEN Y. Convert Gen Y age group insurance consumers into loyal agency customers.
- ◆ PRACTICAL GUIDE TO SUCCESSFUL PLANNING. Plan for success within your own agency.

AGENCY MANAGEMENT TOOLS

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- ◆ AGENCY PREPAREDNESS AND RECOVERY PLAN. The PIA guide to creating an agency-specific business contingency plan.
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- ◆ PIA ADVOCACY DAY. Every spring, PIA members visit Capitol Hill to talk with their elected representatives about issues that are important to independent insurance agents. www.PIAAdvocacyDay.com
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Part 1: Technology Stack - Here we've selected the **top technologies** that can have the most impact on your customers' experience with your agency and grouped them into basic and advanced. Our goal is to help you evaluate which technologies make sense for you and to help you choose vendors that are right for your agency. The basic technologies include voice over IP, email marketing, video conferencing, and live chat. The advanced technologies include social media and search advertising, virtual assistants, collaboration tools, chat bots, and net promoter scores and referrals.

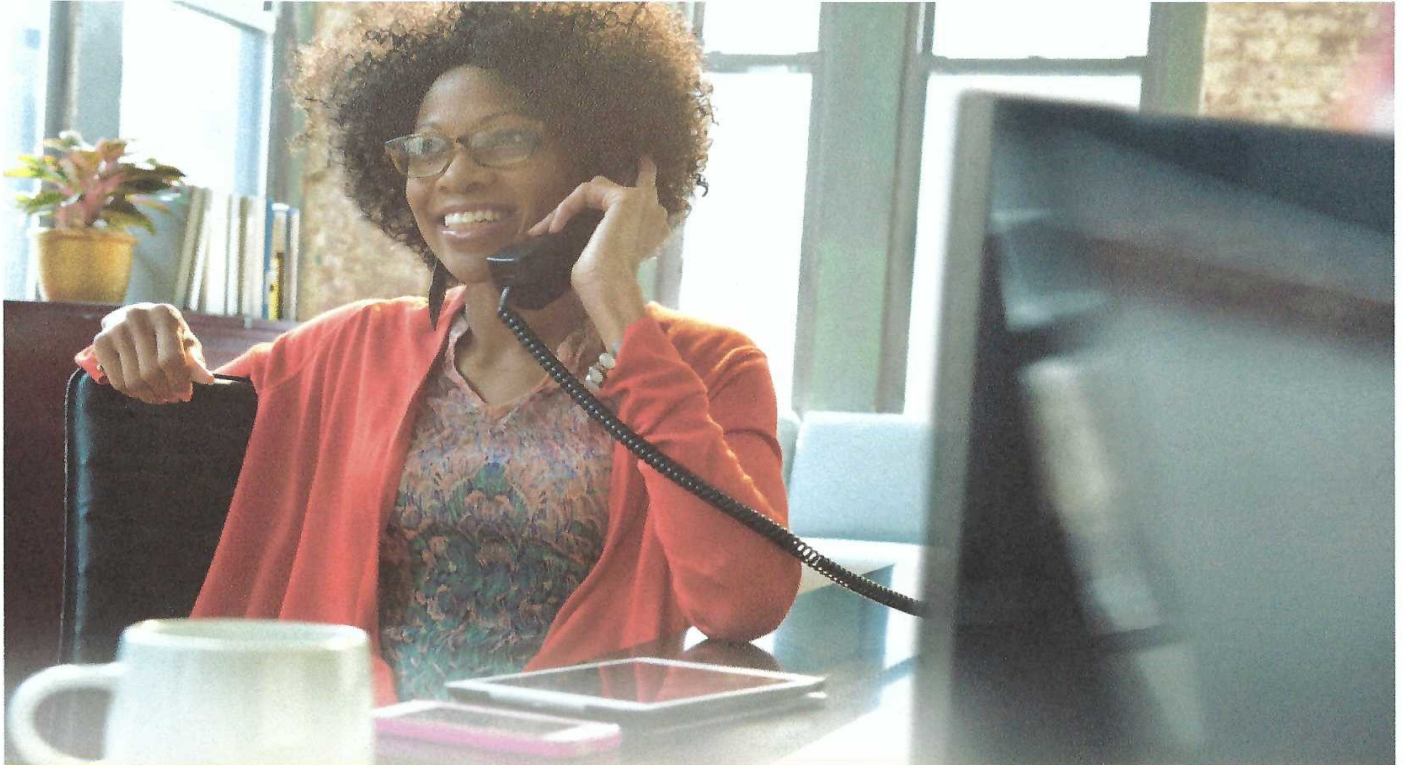
Part 2: Putting it into Practice - This section provides access to **ideas and training** to make the most of the technology tools you've invested in. We've created a number of resources for you to improve your skills. From virtual presentations to email marketing to collaborating online, leverage our videos and toolkits to begin mastering these digital tools. And for those who may want more support, there are options for additional training and services.

Part 3: Learning from Agents - Here you'll find **best practices and stories** of real agents who are using digital technology to build and grow customer relationships as well as enhance employee communications and engagement. We've conducted interviews with agents who are taking advantage of some of the technologies highlighted in Part 1: Technology Stack. Watch their videos and you'll learn about the benefits they are experiencing, the business results these agencies are realizing, and pitfalls to avoid.

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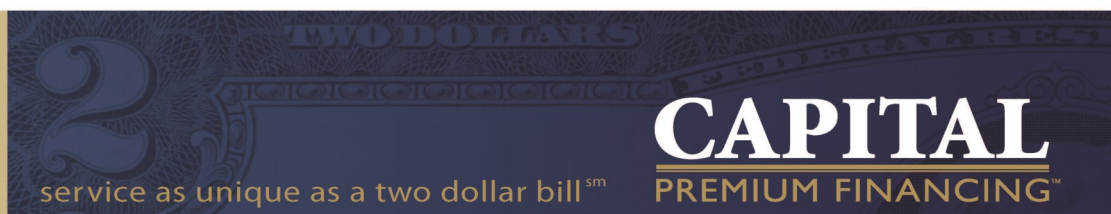
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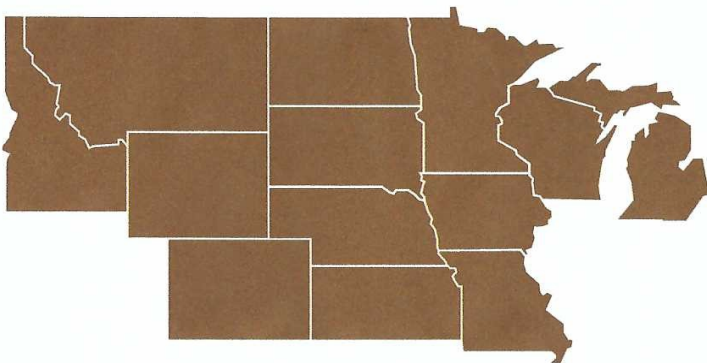
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GREAT PLAINS BROKERAGE

GPBI.com

Jason Kelling
Commerical Broker
Jason@gpbins.com

Elaine Price
Commerical Broker
Elaine@gpbins.com

Joe Hatchett
Commerical Broker
Joe@gpbins.com

Rachel Mertes
Commercial Broker
Rachel@gpbins.com

Joanne Johnson
Acct Manager
Joanne@gpbins.com

Gretchen Groves
Acct Manager
Gretchen@gpbins.com

Linda Medenwald
Dwelling & Commerical Broker
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Victoria Dearing, MBA AAI CPCU RPLU ARM-P
469.320.4033

vdearing@breckis.com

Thomas Blanquez
469.480.9133

tblanquez@breckis.com

222 Las Colinas Blvd West Suite 1300 Irving, TX 75039

Capital Premium Financing

Ed Kocherhans
12235 South 800 East 801.508.5364

Draper, UT 84020 ekocherhans@capitalpremium.net

EMC Companies

Eric Rummel
5445 Denver Tech Center Parkway Ste 320
Greenwood Village, CO 80155 720.200.3712

eric.c.rummel@emcins.com

Genesee General of Colorado

Patrick O'Hara
390 Interlocken Crescent, Ste 140 303.791.0850

Broomfield, CO 80021 pohara@geneseeins.com

Great Plains Brokerage

Rachel Mertes
PO Box 90447 605.328.7000

Sioux Falls, SD rachel@gpbins.com

Imperial PFS

Colleen Marley 303-888-4124

colleen.marley@ipfs.com

Paula Brossman 720-532-3250

paula.brossman@ipfs.com

165 S Union Blvd, Ste 366
Lakewood, CO 80228

Liberty Mutual Mountain Region

T. Carrie Little
10800 E. Geddes Ave, Ste 200 307 620-2474

Englewood, CO 80112 carrie.little@libertymutual.com

Progressive

Amanda Hergenrader
19909 120th Ave NE, Suite 200 425.492.2966

Bothell, WA 98011 ahergenr1@progressive.com

Safeco Insurance

14123 Denver West Parkway
Golden, CO 80401 720.497.9563

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Acuity

Trevor Votruba
2800 S. Taylor Drive
Sheboygan, WI 53081

307.438.3521

trevor.votruba@acuity.com

Breckenridge Insurance Services

Victoria Dearing, MBA AAI CPCU RPLU ARM-P
469.320.4033

vdearing@breckis.com

Thomas Blanquez

469.480.9133

tblanquez@breckis.com

222 Las Colinas Blvd West Suite 1300
Irving, TX 75039

Liberty Mutual Mountain Region

T. Carrie Little
10800 E. Geddes Ave, Ste 200
Englewood, CO 80112

307 620-2474

carrie.little@libertymutual.com

MetLife Auto & Home

Fred Beck
11784 Spruce Mt Rd
Larkspur, Co 80118

719.465.4078

fbeck@metlife.com

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14123 Denver West Parkway
Golden, CO 80401

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Acuity

Trevor Votruba
2800 S. Taylor Drive
Sheboygan, WI 53081 307.438.3521
trevor.votruba@acuity.com

AmTrust North America

Karen Aylmer
9778 S. Ashleigh Lane
Highlands Ranch, CO 80126 303.489.6770
Karen.aylmer@amtrustgroup.com

AmWINS

Debbie Copier
6985 Union Park Center, Ste 625
Midvale, UT 84047 801.438.3768
Debbie.copier@amwins.com

Burns & Wilcox, Ltd., UT

Tiffany Van Ry
280 South 400 West, Suite 200
Salt Lake City, UT 84101 801.432.5469
tavanry@burns-wilcox.com

Capital Premium Financing

Ed Kocherhans
12235 South 800 East
Draper, UT 84020 801.508.5364
ekocherhans@capitalpremium.net

EMC Companies

Eric Rummel
5445 Denver Tech Center Parkway Ste 320
Greenwood Village, CO 80155 720.200.3712
eric.c.rummel@emcins.com

Genesee General of Colorado

Patrick O'Hara
390 Interlocken Crescent, Ste 140
Broomfield, CO 80021 720.636.1089
pohara@geneseeins.com

Grange Insurance

Deb Stephens
200 Cedar Street
Seattle WA 98121 719.660.3232
dstephens@grange.com

Great Plains Brokerage

Rachel Mertes
PO Box 90447
Sioux Falls, SD 605.328.7000
rachel@gpbins.com

Imperial PFS

Colleen Marley
303-888-4124
colleen.marley@ipfs.com
Paula Brossman
720-532-3250
paula.brossman@ipfs.com

165 S Union Blvd, Ste 366
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Liberty Mutual Mountain Region

T. Carrie Little
10800 E. Geddes Ave, Ste 200
Englewood, CO 80112 307 620-2474
carrie.little@libertymutual.com

MetLife Auto & Home

Fred Beck
11784 Spruce Mt Rd
Larkspur, Co 80118 719.465.4078
fbeck@metlife.com

Progressive

Amanda Hergenrader
19909 120th Ave NE, Suite 200
Bothell, WA 98011 425.492.2966
ahergenr1@progressive.com

Ringwalt & Liesche

Shaun T. Olsson
7900 E Union Ave Suite 750
Denver, Co 80237 651.262.2226
solsson@ringwalt.com

Risk Placement Services

Pam Zakarian
485 East Riverside Drive, Suite 300
Eagle, Idaho 83616 208.287.8973
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Safeco Insurance

14123 Denver West Parkway
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Tim Bishop
10825 E. Geddes Ave.
Centennial, CO 80112 720.200.8104
trbishop@travelers.com

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307.201.4801

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Executive Board

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Lela Ladd, CIC, LUTCF (Jim)
 WY FUSA Insurance Agency
 4713 Storm Ct
 Cheyenne, WY 82009 307.851.3225
lladd@fusainsurance.com

President-Elect

Joanna Akers (Rob)
 First State Insurance
 a member of Burns Insurance
 24 N. Sumner
 Newcastle, WY 82701 307.746.3503
joanna@burnsia.com

Secretary-Treasurer

Trudy Lawrence (Jason)
 Burns Insurance Agency, Inc.
 400 Coffeen Ave.
 Sheridan, WY 82801 307.675.1015
trudyl@burnsia.com

Vice President /PIA National Director

Adam Luce, AAI (CJ)
 Rocky Mountain Capital
 PO Box 248
 Cheyenne, WY 82003 307.635.2491
adam@rmca.agency

IIABA National Director

Brad M. Jackson (Tylene)
 Laramie Investment Co. Inc.
 PO Box 1687
 Laramie, WY 82073 307.742.2103
bjackson@laramieinvestment.com

Executive Vice President

Ken Hauck, CIC, ARM, CPIA (Pam)
 AWIA
 PO Box 1321
 Cheyenne, WY 82003
 Ofc. 307.201.4801
 Cell: 307.274.6119
awia@vcn.com

Board

Max Carre', CISR (Yvette)
 Burns Insurance Agency, Inc.
 237 Storey Blvd. Ste. 200
 Cheyenne, WY 82009 307.634.5757
maxc@burnsia.com

Sherri Wilkinson, CISR (Troy)
 Rams Head Financial Services
 PO Box 472
 Greybull, WY 82426 307.765.4419
swilkinson@bighornfederal.com

Susan Keenan, CISR (Tom)
 Wyoming Financial Insurance, Inc.
 1620 East Pershing Blvd
 Cheyenne, WY 82001 307.632.5778
skeenan@wercs.com

Mark Pape
 Tegeler & Associates
 PO Box 4836
 Jackson, WY 83001 307.733.4735
mpape@tegelerinsurance.com

Jenny Schultz
 Tegeler & Associates
 PO Box 1660
 Lyman, WY 82937 307.787.6506
jschultz@tegelerinsurance.com

Ex-Officio

Daniel York, CIC (Nikki)
 Tegeler & Associates
 PO Box 687
 Douglas, WY 82633 307.358.4527
dyork@tegelerinsurance.com



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 Numbers**

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**Wyoming Insurance Department
 Telephone List**

- Burke, Denise777-2450
Senior Policy & Planning Analyst
- Case, Ruth 777-7402
Consumer Affairs Specialist
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Section Manager—Consumer Affairs
Market Conduct Examiner
- DeBella, JoAnne.....777-7319
Licensing Support Specialist
- Feurt, D'Anna777-7336
Policy & Planning Analyst P&C
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Accountant
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