BOARD MEETING

WEDNESDAY FEBRUARY 22, 2023

DALLAS, TX

Agenda

CAA2023 Progression

2022 Results

Staff Roles & Responsibilities

CAAIS Update

Expansion Update

Vendor & Carrier Partnerships

Dues Update

State/Regional Meetings

Future Meeting Information

CAA 2023 Progression

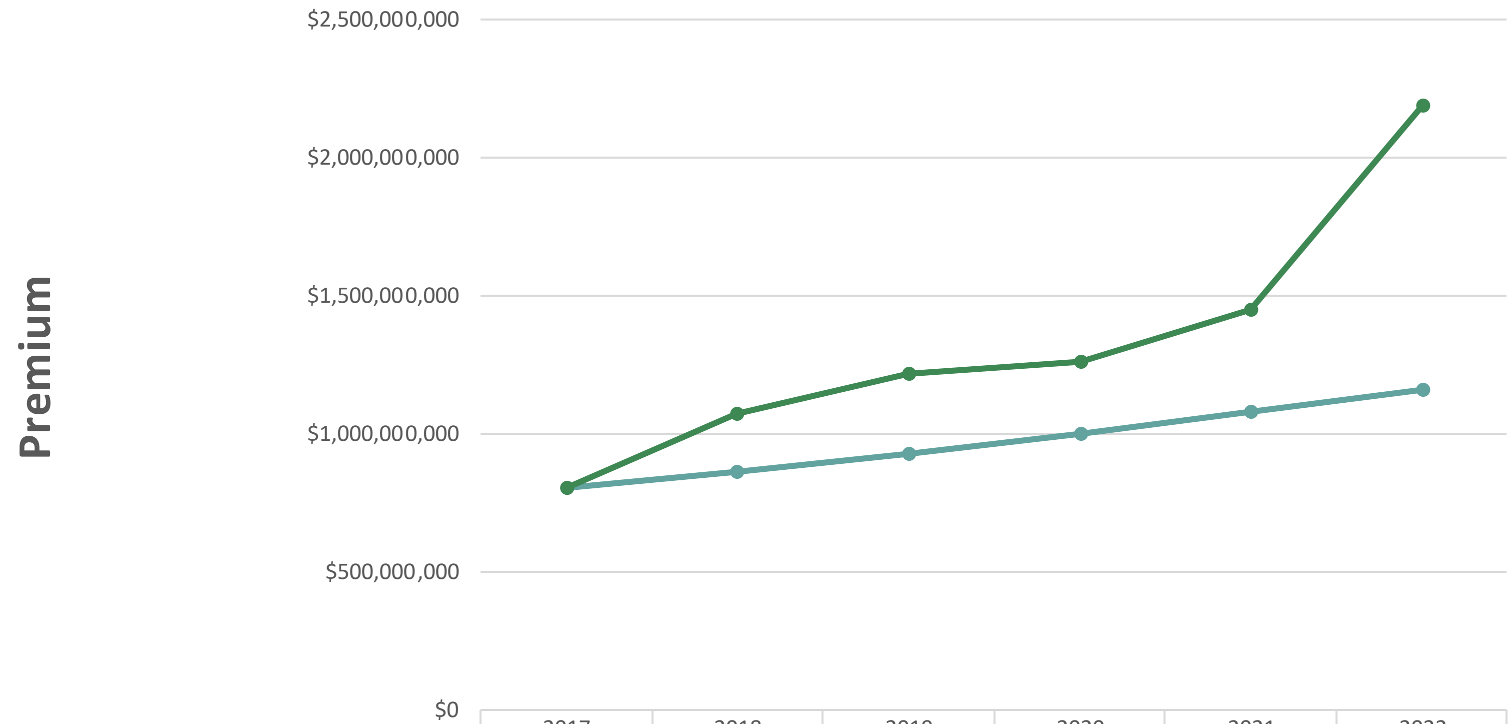
CAA2023

"if we were sitting here 3 years from today, we would be happy…"

Member commitment to being a good partner Member commitment to profitable agency growth 100% Member participation in CAA Strategic Plan & Initiatives	ACCOUNTABILTY CULTURE
$1.5 BILLION Premium Volume=$180M Revenue	$1.5B
Break-even budget	1% COST
Documented strategy working for carrier partners. An accountability model working regarding commitments for member agencies	80% AGGREGATED
Excellent, hired and working professional staff with strong communication model	4.5 EMPLOYEE ENGAGEMENT

CAA Premium Projections & Performance

CAA Premium Growth vs Goal



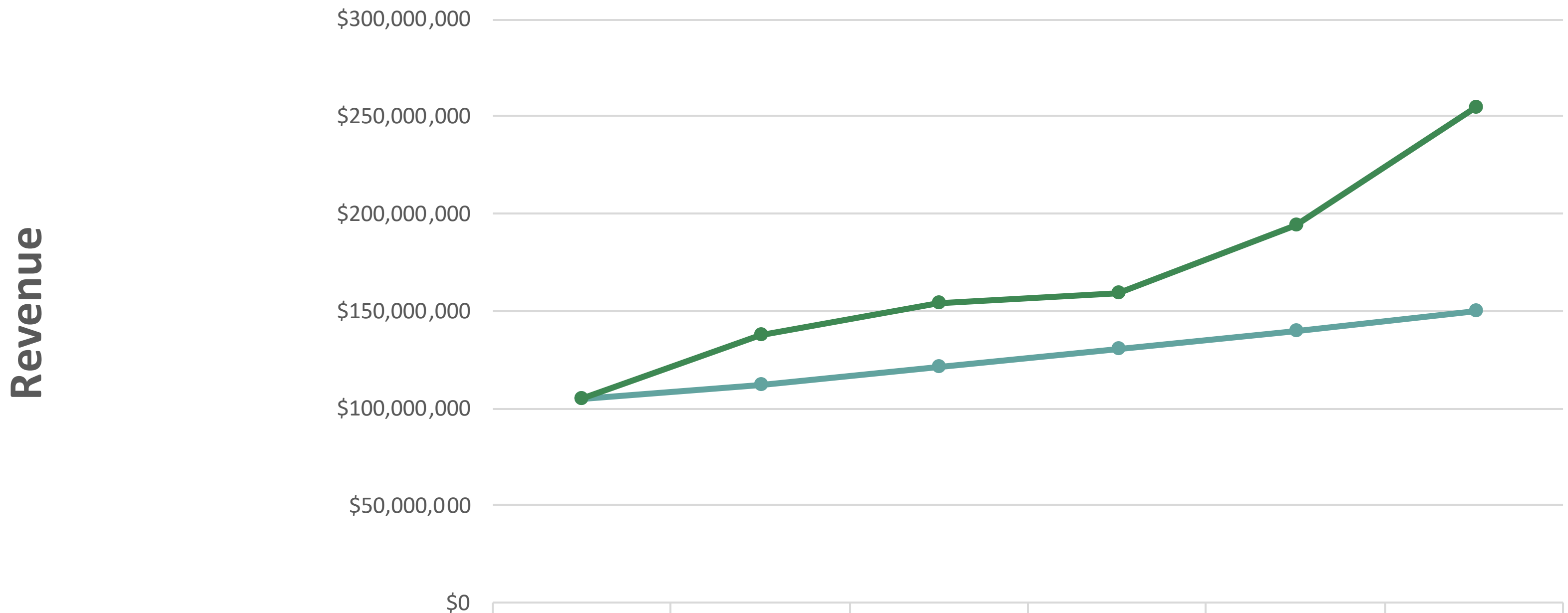
	2017	2018	2019	2020	2021	2022
5% Organic Growth + $26 Mil New Prem	$807,077,320	$859,431,186	$928,402,745	$1,000,822,883	$1,076,864,027	$1,156,707,228
Actual	$807,077,320	$1,074,849,189	$1,218,850,722	$1,263,526,394	$1,449,656,262	$2,192,867,316

Axis Title

5% Organic Growth + $26 Mil New Prem   Actual

CAA Revenue Projections & Performance

CAA Revenue Growth vs Goal



	2017	2018	2019	2020	2021	2022
5% Organic Growth + $3 Mil New Revenue	$104,920,052	$111,726,054	$120,692,357	$130,106,975	$139,992,323	$149,991,939
Actual	$104,920,052	$137,697,076	$153,697,076	$159,204,326	$194,287,539	$254,101,247

Axis Title

5% Organic Growth + $3 Mil New Revenue   Actual

2023

Goal	Data/ Technology	Carrier Relationships	New Members	Current Member Growth	Deepen Agency Engagement	Continuous Improvement
BoM	▪ AgencyKPI Accountability: • Monthly Scorecard Upload ***Goal: 100%*** • Quarterly Clarity upload ***Goal: 100%***	▪ Focus on Core Carrier Alignment ▪ Update Carrier Liaisons (Q1) ▪ Achieve New Business Goals with core carriers ▪ Promote CAA, the network, to your carrier relationships	▪ Cultivate a pipeline with prospects ▪ Goal: $35 Million in premium (EOY)	▪ *5*% Organic Growth Goal ▪ Move 5% of non-core to core	▪ Share 2023 agency business plan/goals with CAA ▪ 80% aggregation ▪ 100% agency representation at meetings ▪ Member Engagement Review Goal: 100% Q2 ▪ Deepening relationships with CAA staff, benefits	▪ Perpetuation Plans Goal: 100% of agencies have documented plans ▪ Continue to champion internal perpetuation among members ▪ Define Mission and Vision Statement (Q1)
CAA	▪ Implement a new CRM (Q1) ▪ Clarity: Fully implement Agency KPI (AMS 360/Epic) (Q1) ▪ Use Clarity for '23 planning strategy ▪ Pilot Wholesale Tuner with 5 members (Q1)	▪ Update Carrier Liaisons (Q1) ▪ Maximize carrier relationships, contracts & production strategy in all states ▪ Distribute profit share in timely-manner ▪ Strengthen relationships at the leadership level ▪ Attend impactful industry events	▪ Expand in current states (MO, OK, CO, SD, TX) ▪ Ob-board 23 new members prior to July Meeting (Q2) ▪ Reconstruct on-boarding process ▪ After action review in Q3 (DMAIC) ▪ Update new member checklist ▪ Develop an on-board evaluation tool for continuous improvement (Q2)	▪ State Meetings (outside of BoM meetings) (Q2) ▪ One per "region/state" ▪ Assisting in carrier alignment ▪ Help agents move 5% of non-core to core	• 80% aggregation ▪ Deepening relationships with member agency/ staff ▪ CRM Roll-out (Q1) ▪ Assist with "OCT" established from Feb BOM Meeting (Q1) ▪ Benefits survey completed (Q1) ▪ Producer development task force (Q1) ▪ Implement	▪ 2024 Strategic Plan (Q4) ▪ Quarterly Staff Reviews & Workshops ▪ 2/year community service activities (annual) ▪ Utilize CRM system to communicate with members (Q2) ▪ Evaluate & develop core carrier relationships ▪ CAA marketing/branding guidelines (Q1) ▪ Evaluate vendor relationships (Q1) ▪ Aligned benefits with state associations (Q2)
CAAIS	▪ Implement Tarmika in Processes and Procedures *(Q1)* ▪ Utilize Patra to its fullest capacity	▪ Collaborate with CAA on relationship management: Production goals by carrier/by region ▪ Track & report progress on goals/production	▪ Incorporate IS in onboard process ▪ Goal: new members using IS ▪ New members using new submission checklist ▪ MGA analysis – rolling books quicker	▪ Strong adoption of IS with a solid % of members ▪ Increase volume by agency ▪ MGA analysis – rolling books quicker ▪ Graduate members to direct appointment	▪ Member knowledge of IS - who, what, why, how, when?	▪ Increase Bind Ratio ▪ IS Team development Designations: TIIA, ACSR/CISR ▪ Continue building new staff structure with regional teams ▪ CIS guide- brochure

2022 YTD Results

2022 CAA Core Carrier Production

Written Premium — Jan 2022 - Dec 2022

	Current	Prior	Change
Personal	$349,554,781	$276,195,080	$73,359,700 (26.56%)
Commercial	$591,695,780	$496,759,907	$94,935,873 (19.11%)
Bond	$10,673,212	$9,118,859	$1,554,352 (17.05%)
Total	$951,923,772	$782,073,847	$169,849,926 (21.72%)

New Business — Jan 2022 - Dec 2022

	Current	Prior	Change	% of Book
Personal	$50,959,358	$42,217,605	$8,741,754 (20.71%)	14.58%
Commercial	$98,595,693	$80,704,248	$17,891,445 (22.17%)	16.66%
Bond	$3,042,199	$2,577,173	$465,026 (18.04%)	28.50%
Total	$152,597,250	$125,499,026	$27,098,224 (21.59%)	16.03%

Loss Ratio — Jan 2022 - Dec 2022

	EP	IL	Current	Prior
Personal	$309,425,425	$219,786,352	71.03%	64.24%
Commercial	$448,926,342	$250,442,432	55.79%	56.92%
Bond	$11,862,605	$1,772,777	14.94%	4.02%
Total	$770,214,372	$472,001,561	61.28%	58.90%

2022 CAA Core Carrier Performance by State

State	WP YTD	New Biz YTD	WP 12 MM	Loss Ratio
Colorado	41%	19%	41%	88%
Iowa	48%	12%	48%	61%
Kansas	16%	12%	16%	62%
Missouri	-5%	17%	4-5%	47%
Nebraska	10%	12%	10%	53%
Oklahoma	-.4%	18%	-.4%	35%
South Dakota	243%	11%	243%	100%
Texas	21%	19%	21%	57%

Does Not Include the Following Carriers:

Cincinnati: $39 Mil **Auto Owners $35 Mil**

UFG: $22 Mil **West Bend: $26 Mil**

Top Carriers

Name		Written Premium			New Business				Loss Ratio			
Name		Current	Prior	Change	Current	Prior	Change	% of Book	EP	IL	Current	Prior
Nationwide Insurance	12/22	$176,625,947	$140,784,153	25.46%	$18,101,411	$16,796,110	7.77%	10.25%	$170,749,228	$121,486,579	71.15%	61.59%
Travelers	12/22	$134,687,414	$109,543,473	22.95%	$21,183,299	$14,870,929	42.45%	15.73%	$124,858,614	$71,298,289	57.10%	57.91%
Progressive Insurance	12/22	$78,310,860	$63,830,010	22.69%	$15,505,046	$15,332,436	1.13%	19.80%	$76,200,066	$42,930,644	56.34%	65.43%
EMC Insurance	12/22	$74,916,420	$67,461,213	11.05%	$6,842,583	$5,896,810	16.04%	9.13%	$70,724,750	$25,432,233	35.96%	58.28%
Safeco Insurance	12/22	$65,574,549	$55,523,041	18.10%	$9,662,258	$10,251,892	-5.75%	14.73%	$63,128,720	$48,190,608	76.34%	59.64%
Acuity	12/22	$49,901,915	$33,123,384	50.65%	$10,688,214	$6,138,137	74.13%	21.42%	$42,917,186	$35,223,234	82.07%	44.22%
Texas Mutual	12/22	$40,482,248	$30,044,831	34.74%	$4,024,427	$2,438,284	65.05%	9.94%	$39,032,722	$19,224,121	49.25%	41.83%
AmWins Group	11/22	$40,324,616	$31,319,984	28.75%	$13,454,367	$8,554,228	57.28%	33.37%	$0	$0	0.00%	0.00%
State Auto	12/22	$30,685,293	$20,485,335	49.79%	$5,885,621	$4,878,225	20.65%	19.18%	$28,767,221	$19,754,531	68.67%	61.99%
CRC Insurance Services	12/22	$29,714,902	$20,868,026	42.39%	$10,604,283	$5,445,112	94.75%	35.69%	$0	$0	0.00%	0.00%
Central Insurance	12/22	$27,819,084	$28,742,904	-3.21%	$1,892,788	$2,137,765	-11.46%	6.80%	$0	$0	0.00%	0.00%
West Bend Mutual	12/22	$27,583,222	$4,568,242	503.80%	$3,718,119	$414,283	797.48%	13.48%	$25,582,889	$17,367,760	67.89%	54.01%
Hartford Insurance	12/22	$22,251,369	$18,731,241	18.79%	$4,317,974	$3,632,843	18.86%	19.41%	$21,000,492	$7,861,582	37.44%	48.73%
CNA	11/22	$21,685,681	$12,916,840	67.89%	$3,493,746	$1,905,998	83.30%	16.11%	$0	$0	0.00%	0.00%
Chubb Group of Insurance Companies	11/22	$18,530,864	$18,015,416	2.86%	$1,161,377	$1,559,082	-25.51%	6.27%	$18,309,152	$10,225,742	55.85%	74.30%
Totals:		**$951,923,772**	**$781,576,200**	**21.80 %**	**$152,597,250**	**$125,420,299**	**21.67 %**	**16.03 %**	**$770,214,372**	**$472,001,561**	**61.28 %**	**58.90 %**

Top Personal Carriers

	Written Premium			New Business				Loss Ratio			
Name	Current	Prior	Change	Current	Prior	Change	% of Book	EP	IL	Current	Prior
Nationwide Insurance 12/22	$95,970,892	$75,706,613	26.77%	$9,094,818	$8,446,098	7.68%	9.48%	$92,873,018	$69,350,925	74.67%	62.60%
Safeco Insurance 12/22	$65,574,549	$55,523,041	18.10%	$9,662,258	$10,251,892	-5.75%	14.73%	$63,128,720	$48,190,608	76.34%	59.64%
Travelers 12/22	$59,387,901	$48,081,069	23.52%	$11,709,079	$8,584,006	36.41%	19.72%	$54,820,074	$34,741,994	63.37%	64.47%
Progressive Insurance 12/22	$50,068,030	$41,129,209	21.73%	$7,538,226	$7,286,558	3.45%	15.06%	$49,115,134	$28,751,090	58.54%	61.44%
Central Insurance 12/22	$13,800,348	$13,727,878	0.53%	$437,586	$255,181	71.48%	3.17%	$0	$0	0.00%	0.00%
West Bend Mutual 12/22	$11,380,809	$0	N/A	$1,318,776	$0	N/A	11.59%	$10,475,679	$9,899,198	94.50%	0.00%
State Auto 12/22	$9,773,542	$6,288,683	55.41%	$1,581,375	$1,173,206	34.79%	16.18%	$9,495,186	$9,217,862	97.08%	73.05%
Acuity 12/22	$8,748,592	$4,863,725	79.87%	$3,612,368	$1,419,473	154.49%	41.29%	$6,457,835	$5,531,093	85.65%	55.84%
Chubb Group of Insurance Companies 11/22	$8,349,830	$7,761,637	7.58%	$364,249	$222,281	63.87%	4.36%	$8,404,517	$6,495,962	77.29%	115.94%
Nationwide Private Client Group 12/22	$5,924,998	$4,989,027	18.76%	$579,305	$843,936	-31.36%	9.78%	$5,555,817	$2,859,182	51.46%	78.35%
Foremost 12/22	$5,619,110	$4,524,163	24.20%	$1,711,520	$1,590,161	7.63%	30.46%	$2,701,648	$1,094,406	40.51%	53.03%
Allstate Insurance 9/22	$3,326,178	$3,010,062	10.50%	$479,371	$372,878	28.56%	14.41%	$0	$0	0.00%	0.00%
Foremost Signature (formerly MetLife P&C) 6/22	$2,724,420	$2,669,949	2.04%	$938,962	$360,614	160.38%	34.46%	$26,994	$1,154	4.28%	35.45%
Wright Flood Insurance 12/22	$2,551,792	$2,264,554	12.68%	$517,358	$333,858	54.96%	20.27%	$2,463,023	$667,209	27.09%	68.98%
Burns & Wilcox 12/22	$1,932,834	$1,618,953	19.39%	$508,246	$490,185	3.68%	26.30%	$0	$0	0.00%	0.00%
Totals:	**$349,554,781**	**$276,148,818**	**26.58 %**	**$50,959,358**	**$42,202,536**	**20.75 %**	**14.58 %**	**$309,425,425**	**$219,786,352**	**71.03 %**	**64.24 %**

Top Commercial Carriers

		Written Premium			New Business				Loss Ratio			
Name		Current	Prior	Change	Current	Prior	Change	% of Book	EP	IL	Current	Prior
Nationwide Insurance	12/22	$79,748,798	$64,313,708	24.00%	$8,307,881	$7,775,246	6.85%	10.42%	$76,940,012	$51,525,591	66.97%	61.16%
EMC Insurance	12/22	$74,441,208	$67,147,161	10.86%	$6,420,331	$5,645,695	13.72%	8.62%	$70,224,525	$25,437,852	36.22%	58.72%
Travelers	12/22	$67,805,042	$55,303,792	22.60%	$8,661,279	$5,738,494	50.93%	12.77%	$62,648,907	$34,920,413	55.74%	54.44%
Acuity	12/22	$41,131,574	$28,238,309	45.66%	$7,073,292	$4,716,723	49.96%	17.20%	$36,435,320	$29,692,141	81.49%	42.39%
Texas Mutual	12/22	$40,482,248	$30,044,831	34.74%	$4,024,427	$2,438,284	65.05%	9.94%	$39,032,722	$19,224,121	49.25%	41.83%
AmWins Group	11/22	$40,000,068	$30,878,244	29.54%	$13,401,677	$8,462,854	58.36%	33.50%	$0	$0	0.00%	0.00%
CRC Insurance Services	12/22	$29,653,726	$20,835,664	42.32%	$10,555,855	$5,415,180	94.93%	35.60%	$0	$0	0.00%	0.00%
Progressive Insurance	12/22	$28,242,830	$22,700,801	24.41%	$7,966,820	$8,045,878	-0.98%	28.21%	$27,084,932	$14,179,553	52.35%	73.54%
CNA	11/22	$21,611,819	$12,896,041	67.58%	$3,493,746	$1,905,998	83.30%	16.17%	$0	$0	0.00%	0.00%
State Auto	12/22	$20,911,752	$14,196,652	47.30%	$4,304,246	$3,705,019	16.17%	20.58%	$19,272,035	$10,536,668	54.67%	56.86%
Hartford Insurance	12/22	$20,334,614	$16,722,952	21.60%	$3,714,991	$3,173,748	17.05%	18.27%	$19,109,352	$7,230,948	37.84%	49.49%
West Bend Mutual	12/22	$16,152,842	$4,513,896	257.85%	$2,373,949	$368,177	544.78%	14.70%	$15,053,384	$7,468,562	49.61%	54.66%
Central Insurance	12/22	$14,018,736	$15,015,026	-6.64%	$1,455,202	$1,882,584	-22.70%	10.38%	$0	$0	0.00%	0.00%
Continental Western	12/22	$13,480,211	$11,157,747	20.81%	$2,627,690	$2,130,799	23.32%	19.49%	$13,573,368	$7,622,002	56.15%	33.05%
Accident Fund Insurance	12/22	$13,291,236	$12,593,860	5.54%	$1,720,746	$1,607,359	7.05%	12.95%	$14,111,747	$7,888,347	55.90%	75.09%
Totals:		**$591,695,780**	**$496,308,523**	**19.22 %**	**$98,595,693**	**$80,640,590**	**22.27 %**	**16.66 %**	**$448,926,342**	**$250,442,432**	**55.79 %**	**56.92 %**

2022 Southwest Member Performance

Member/Non-Member - Organization	Home Office State	2022 Total Premium		2022 P&C Revenue	2021 P&C Revenue	2022 Revenue Inc	2022 Revenue % Increase
AARS & NELSON INSURANCE AGENCY, LP	Texas	$2,338,850.00	[redacted]	$364,544.00	$300,066.38	$64,477.62	21%
ABI INSURANCE	Arkansas	$15,096,520.00	[redacted]	$2,009,647.00		$2,009,647.00	
BAILEY INSURANCE AND RISK MANAGEMENT	Texas	$26,913,190.00	[redacted]	$3,547,495.00	$3,552,063.00	-$4,568.00	0%
BARNARD INSURANCE AGENCY, LLP	Texas	$10,845,746.00	[redacted]	$1,478,175.00	$1,090,801.00	$387,374.00	36%
BENCHMARK INS GROUP	Texas	$6,503,655.00	[redacted]	$870,037.00	$758,660.00	$111,377.00	15%
BENTON LUTTRELL COMPANY	Texas	$13,453,539.00	[redacted]	$1,823,963.00	$1,602,022.00	$221,941.00	14%
BIBBY, BRILLING & ASSOCIATES, LLP	Texas	$17,967,459.00	[redacted]	$2,407,779.00	$2,259,988.00	$147,791.00	7%
BOSWORTH & ASSOCIATES	Texas	$25,460,050.00	[redacted]	$2,476,441.00	$2,436,351.42	$40,089.58	2%
BOYD, SHACKELFORD, BARNETT & DIXON, LLC	Texas	$81,321,409.00	[redacted]	$8,809,343.00	$6,438,230.00	$2,371,113.00	37%
BROWNRIGG INS AGENCY, INC.	Texas	$15,870,057.00	[redacted]	$2,159,669.00	$1,936,132.00	$223,537.00	12%
BRYAN INSURANCE AGENCY, LTD.	Texas	$18,008,045.00	[redacted]	$2,068,994.00	$1,677,426.00	$391,568.00	23%
CRAVENS, WARREN & CO	Texas	$32,009,986.00	[redacted]	$3,559,038.00	$3,260,242.00	$298,796.00	9%
CROCKETT INS SERVICE	Texas	$7,000,000.00	[redacted]	$895,500.00	$718,000.00	$177,500.00	25%
Cross Pointe Insurance Advisors, LLC	Arkansas	$202,138,117.00	[redacted]	$16,759,758.00		$16,759,758.00	
DAVIS & GARRATT	Arkansas	$6,998,016.00	[redacted]	$895,980.00		$895,980.00	
ED BERRONG INSURANCE AGENCY	Oklahoma	$15,536,000.00	[redacted]	$2,069,000.00	$2,211,611.00	-$142,611.00	-6%
ED WEEREN INS AGENCY, INC.	Texas	$5,174,472.00	[redacted]	$696,676.00	$666,121.00	$30,555.00	5%
EITZEN INSURANCE GROUP	Oklahoma	$12,044,245.00	[redacted]	$1,800,817.00	$1,332,554.27	$468,262.73	35%
EVANS, EWAN & BRADY INS. AGENCY	Texas	$18,029,651.00	[redacted]	$2,406,039.00	$2,255,038.83	$151,000.17	7%
EVOLUTION INSURANCE PARTNERS	Texas	$16,600,000.00	[redacted]	$1,729,725.00	$1,449,600.00	$280,125.00	19%
FIRST INSURANCE SERVICES	Texas	$11,442,073.00	[redacted]	$1,698,734.00	$1,367,291.00	$331,443.00	24%
GANS & SMITH INSURANCE AGENCY	Texas	$26,252,000.00	[redacted]	$2,010,000.00	$2,053,646.00	-$43,646.00	-2%
GBMB INSURANCE AGENCY LLC	Texas	$27,070,300.00	[redacted]	$3,379,250.00	$2,937,200.00	$442,050.00	15%
GBS Insurance Agency, Inc.	Texas	$7,937,528.00	[redacted]	$1,025,688.00	$954,823.00	$70,865.00	7%
HILL COUNTY INSURANCE AGENCY	Texas	$7,072,369.00	[redacted]	$892,036.00	$807,755.00	$84,281.00	10%

2022 Southwest Member Performance

Member/Non-Member - Organization	Home Office State	2022 Total Premium		2022 P&C Revenue	2021 P&C Revenue	2022 Revenue Inc	2022 Revenue % Increase
HUTCHERSON INSURANCE GROUP, LLC	Texas	$17,465,947.00		$2,269,628.00	$2,057,007.88	$212,620.12	10%
INSURANCE NET, INC.	Texas	$4,610,457.00		$571,747.00	$561,099.00	$10,648.00	2%
INTEGRITY INSURANCE	Arkansas	$9,686,733.00		$1,153,326.00		$1,153,326.00	
J.S. EDWARDS & SHERLOCK INS. AGY	Texas	$32,946,150.00		$3,737,375.00	$3,456,395.00	$280,980.00	8%
JHC INSURANCE AGENCY, INC.	Texas	$8,474,635.00		$1,126,155.00	$1,063,041.36	$63,113.64	6%
JORDAN BARNETT AGENCY	Oklahoma	$6,616,107.00		$720,814.00		$720,814.00	
LandesBlosch	Oklahoma	$16,123,582.00		$2,226,930.00	$2,012,804.89	$214,125.11	11%
Lee Insurance Agency Inc	Texas	$14,778,554.00		$1,656,796.00		$1,656,796.00	
MARK V WILLIAMSON COMPANY	Arkansas	$24,326,551.00		$2,883,373.00		$2,883,373.00	
MCCORKLE COMM INS AGENCY, LLC	Texas	$5,338,300.00		$671,000.00	$624,000.00	$47,000.00	8%
MENA INSURANCE AGENCY	Arkansas	$8,994,593.00		$813,289.00		$813,289.00	
MORGAN INSURANCE AGENCY, LTD	Texas	$49,008,134.00		$5,406,155.00	$4,630,171.35	$775,983.65	17%
MR. INSURANCE AGENCY, INC.	Texas	$21,587,541.00		$2,691,118.00	$2,578,329.00	$112,789.00	4%
PATTERSON & ASSOCIATES INSURANCE	Texas	$49,947,711.00		$6,717,215.00	$5,741,813.92	$975,401.08	17%
PIERSON & FENDLEY INS AGENCY, LLC	Texas	$24,232,472.00		$3,066,374.00	$2,728,397.00	$337,977.00	12%
RNC Insurance Agency, Inc.	Texas	$11,782,690.00		$897,572.00	$914,396.00	-$16,824.00	-2%
SMITH & COMPANY	Arkansas	$21,560,949.00		$2,678,570.00		$2,678,570.00	
THE ARROW GROUP	Oklahoma	$28,565,244.00		$3,261,302.00		$3,261,302.00	
THE SHROPSHIRE AGENCY, INC.	Texas	$7,931,076.00		$1,010,046.00	$971,358.00	$38,688.00	4%
TIA GROUP	Texas	$21,802,129.00		$1,352,925.00	$1,236,357.98	$116,567.02	9%
WALTHALL SACHSE & PIPES, INC	Texas	$24,209,565.00		$3,318,433.00	$2,940,912.00	$377,521.00	13%
Weatherby-Eisenrich Insurance	Texas	$21,052,705.00		$2,787,664.00	$2,279,977.00	$507,687.00	22%
WELLMANN INSURANCE	Texas	$25,381,473.00		$3,133,573.00	$2,361,684.00	$771,889.00	33%
Whorton Insurance Services	Texas	$53,287,854.00		$7,277,124.00	$5,103,163.54	$2,173,960.46	43%
Williams Insurance Agency	Texas	$5,291,970.00		$661,496.00		$661,496.00	
Southwest Total	ALL	$1,144,086,399.00		$129,924,328.00	$83,326,529.82	$46,597,798.18	56%

2022 Central Member Performance

Member/Non-Member - Organization	Home Office State	2022 Total Premium		2022 P&C Revenue	2021 P&C Revenue	2022 Revenue Inc	2022 Revenue % Increase
AGRI-CITY INSURANCE AGENCY, LLC	Nebraska	$17,335,938.00	[redacted]	$2,291,338.00	$1,967,671.00	$323,667.00	16%
AL SHANK INSURANCE, INC.	Kansas	$6,497,945.00	[redacted]	$775,150.00		$775,150.00	
ARNOLD INSURANCE AGENCY	Nebraska	$16,759,431.00	[redacted]	$1,267,640.00	$1,710,055.00	-$442,415.00	-26%
BRIDGEMARK INSURANCE SOULTIONS	South Dakota	$18,673,939.00	[redacted]	$2,433,067.00	$2,805,267.63	-$372,200.63	-13%
CONEXUS INSURANCE PARTNERS	Colorado	$51,053,341.00	[redacted]	$4,339,815.00	$1,847,567.97	$2,492,247.03	135%
DODGE PARTNERS INSURANCE	Nebraska	$28,746,000.00	[redacted]	$4,971,681.00	$4,298,715.00	$672,966.00	16%
ELLIOTT INSURANCE GROUP	Kansas	$59,161,583.00	[redacted]	$7,668,630.00	$8,046,435.00	-$377,805.00	-5%
FIRST STATE INSURANCE AGENCY, INC.	Missouri	$93,261,283.00	[redacted]	$8,582,034.00	$8,155,900.23	$426,133.77	5%
FOUTS, DAVIDSON, BURKS AGENCY, LLC	Kansas	$12,951,814.00	[redacted]	$1,772,228.00	$1,641,593.98	$130,634.02	8%
FUQUA INSURANCE GROUP	Kansas	$9,876,931.00	[redacted]	$1,351,453.00	$1,273,529.12	$77,923.88	6%
GM PETERS AGENCY	Missouri	$36,500,000.00	[redacted]	$4,300,000.00	$3,410,000.00	$890,000.00	26%
ICI	Kansas	$49,737,417.00	[redacted]	$5,979,414.00	$5,855,519.00	$123,895.00	2%
Independent Brokers Agency LLC	Missouri	$8,559,687.00	[redacted]	$1,149,980.00	$1,034,449.18	$115,530.82	11%
INSURANCE PLUS	South Dakota	$48,838,085.00	[redacted]	$6,298,290.00	$5,192,749.00	$1,105,541.00	21%
INSUROR'S OF THE OZARKS	Missouri	$3,985,000.00	[redacted]	$545,675.00		$545,675.00	
Iron Insurance Partners, LLC	Kansas	$90,234,994.00	[redacted]	$11,752,010.00	$10,657,351.12	$1,094,658.88	10%
KELLERMAN INSURANCE, INC.	Kansas	$4,654,429.00	[redacted]	$604,928.00		$604,928.00	
LUDOVISSY & ASSOCIATES INSURANCE	Iowa	$15,475,716.00	[redacted]	$1,899,735.00	$1,796,770.34	$102,964.66	6%
MCKINNEYOLSON INSURANCE	South Dakota	$37,452,623.00	[redacted]	$5,152,766.00	$4,733,311.00	$419,455.00	9%
Miller Fidler & Hinke	Iowa	$17,757,410.00	[redacted]	$2,298,891.00		$2,298,891.00	
PLUMMER INSURANCE, INC.	Nebraska	$50,000,000.00	[redacted]	$4,760,000.00	$3,821,281.06	$938,718.94	25%
PORTER, SPEARS & BUNDY INSURANCE AGENCY, INC.	Kansas	$9,000,000.00	[redacted]	$1,560,000.00		$1,560,000.00	

2022 Central Member Performance

Member/Non-Member - Organization	Home Office State	2022 Total Premium		2022 P&C Revenue	2021 P&C Revenue	2022 Revenue Inc	2022 Revenue % Increase
RALEIGH INSURANCE AGENCY, INC.	Kansas	$5,670,871.00	[redacted]	$745,406.00		$745,406.00	
RELION INSURANCE SOLUTIONS	Iowa	$78,763,064.00	[redacted]	$9,134,022.00	$8,448,687.00	$685,335.00	8%
RENAISSANCE INSURANCE GROUP, LLC.	Colorado	$28,052,384.00	[redacted]	$3,504,965.00	$2,806,826.69	$698,138.31	25%
RENN & COMPANY, INC.	Kansas	$8,046,627.00	[redacted]	$1,087,402.00		$1,087,402.00	
RYDER ROSACKER MCCUE & HUSTON	Nebraska	$42,151,387.00	[redacted]	$5,229,318.00	$4,288,666.25	$940,651.75	22%
SAYLOR INSURANCE SERVICES, INC.	Kansas	$13,311,336.00	[redacted]	$696,394.00		$696,394.00	
SBS INSURANCE	Kansas	$24,448,201.00	[redacted]	$2,634,193.00	$2,441,356.34	$192,836.66	8%
SINNOTT AGENCY	Iowa	$11,775,947.00	[redacted]	$1,420,545.00	$1,292,962.00	$127,583.00	10%
SMART INSURANCE (MISSOURI)	Missouri	$8,089,058.00	[redacted]	$1,011,202.00		$1,011,202.00	
SMART INSURANCE AGENCY, INC.	Kansas	$10,569,966.00	[redacted]	$1,398,081.00	$1,259,460.20	$138,620.80	11%
STEPHENS CHAPIN INSURANCE	Kansas	$4,250,012.00	[redacted]	$489,735.00	$484,969.00	$4,766.00	1%
STILLE PIERCE & PERTZBORN INSURANCE SERVICES	Iowa	$11,294,335.00	[redacted]	$1,315,545.00	$1,296,547.00	$18,998.00	1%
T. R. BAKER AGENCY	Missouri	$2,713,324.00	[redacted]	$390,923.00		$390,923.00	
TEAGARDEN (dba TRULY INSURANCE)	Kansas	$4,125,821.00	[redacted]	$547,378.00		$547,378.00	
THE DANA COMPANY	Iowa	$32,148,094.00	[redacted]	$4,195,558.00	$3,674,487.00	$521,071.00	14%
THE INSURANCE LOFT	Colorado	$18,200,000.00	[redacted]	$2,615,000.00	$1,510,000.00	$1,105,000.00	73%
TYNER INSURANCE GROUP, INC.	Kansas	$13,500,000.00	[redacted]	$1,200,000.00		$1,200,000.00	
United Agency	Kansas	$4,975,729.00	[redacted]	$658,205.00	$570,059.56	$88,145.44	15%
VAN ENGELENHOVEN AGENCY	Iowa	$23,000,000.00	[redacted]	$1,731,237.00	$1,163,000.00	$568,237.00	49%
Wood Insurance Center, LLC	Kansas	$17,181,195.00	[redacted]	$2,417,085.00	$2,411,001.00	$6,084.00	0%
Central Total	ALL	$1,048,780,917.00	[redacted]	$124,176,919.00	$99,896,187.67	$24,280,731.33	24%

2022 P&C Premium and Revenue

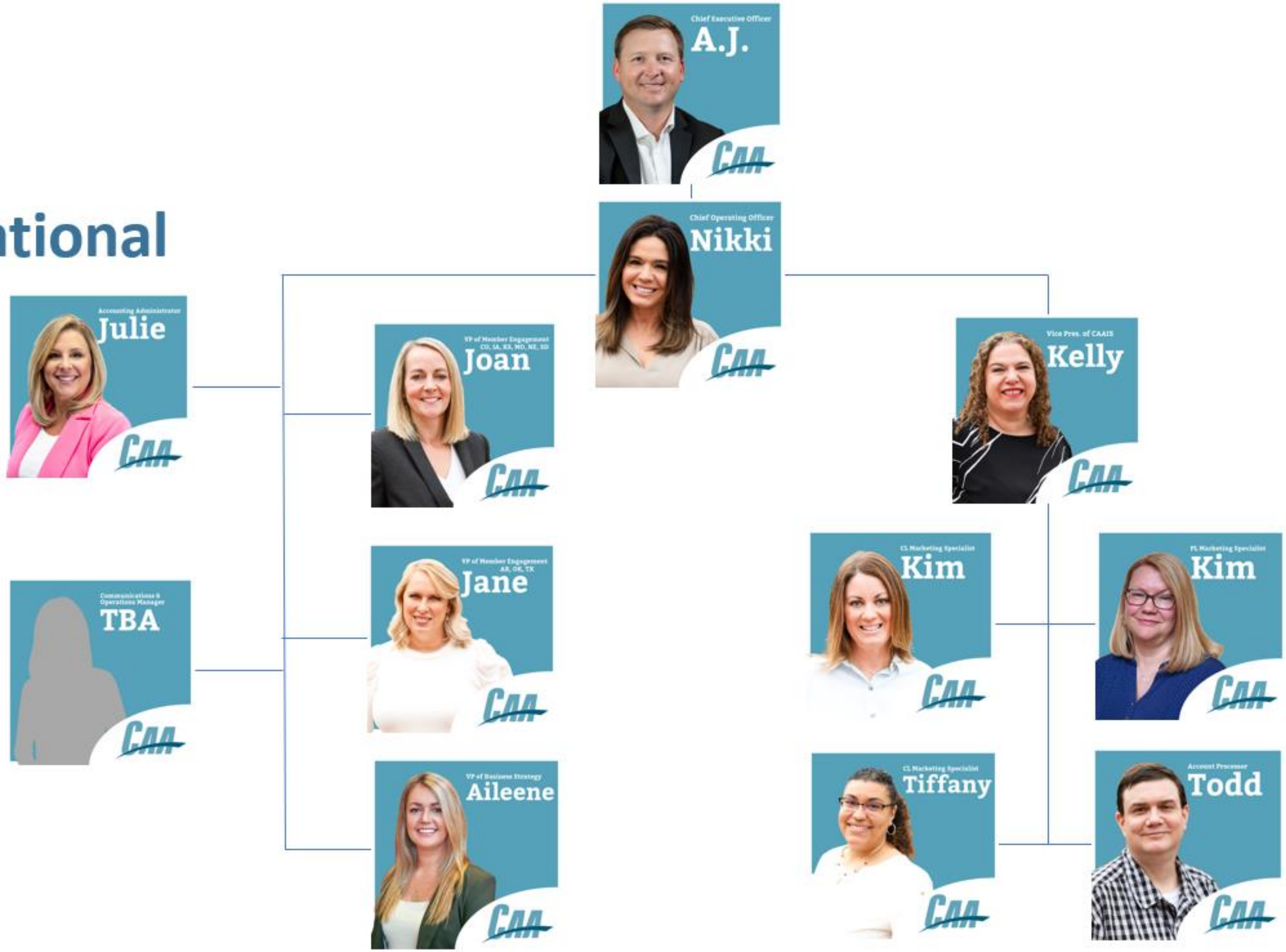
Existing Members					
2022 Total Premium	2022 Premium Growth	Premium Growth %	2022 P&C Revenue	2022 P&C Revenue Growth	Revenue Growth %
$1,585,773,699.00	$218,161,520.81	16%	$209,143,547.00	$25,920,829.51	14%

New Members					
2022 Total Premium	2022 Premium Growth	Premium Growth %	2022 P&C Revenue	2022 P&C Revenue Growth	Revenue Growth %
$441,405,175.00			$44,957,700.00		

Total					
2022 Total Premium	2022 Premium Growth	Premium Growth %	2022 P&C Revenue	2022 P&C Revenue Growth	Revenue Growth %
$2,027,178,874.00	$659,566,695.81	48%	$254,101,247.00	$70,878,529.51	39%

Staff Roles & Responsibilities

CAA Organizational Chart



CAAIS Update

A NEW LOOK

Kelly Surles, CIC, CPRM, CISR, ACSR
VP of CAA Insurance Services
March 2022

Tiffany Arvie
CL Marketing Specialist – Southwest Region
June 2022

Kim Deever
CL Marketing Specialist – Central Region
November 2021

Todd Broz
Renewal Account Manager and Processor- PL & CL

2022

- CAAIS YTD TWP

2022

TOTAL WRITTEN PREMIUM EOY through December 2022

$11.3M

Commercial - $6,275,853

Personal - $5,112,416

Commercial Lines- YTD through December 2022

<u>Commercial Lines TWP $6,275,852</u>

New Business = $2,329,600

$2.1M in New Business from Texas region!

Commercial Lines Submissions- August to December 2022

Obstacles & Challenges

Blocking the Market

Incomplete Submissions

Insufficient Time

Lack of Underwriter Response

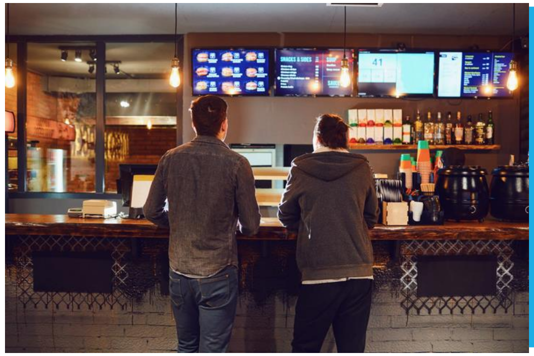
Procedure Changes Implemented to overcome challenges- CL

- New Business Submissions
- Change Requests and Endorsement Processing
- Videos to Members:
  Who is CAAIS?

Carriers- Commercial Lines

- AccidentFund
- AIG
- AmTrust Financial
- CHUBB
- CNA
- EMC Insurance
- Great American Insurance Group
- The Hanover Insurance Group
- Harleysville, a Nationwide Insurance company
- The Hartford & Livestock
- Insurors Indemnity Companies
- Liberty Mutual Insurance
- National American Insurance Company
- Nationwide
- Philadelphia Insurance Companies, A Member of the Tokio Marine Group
- State Auto Insurance Companies
- Travelers
- Union Standard Insurance Group | a Berkley Company
- Utica National Insurance Group

Account Wins!



Fast Food Restaurants Mr. Insurance- Utica

Restaurants- No alcohol sales

PROP, CGL, Auto, Umbrella

$295,110

Steam & AC Supply Company- TIA Group- State Auto

Auto

$127,269

Window & Door Manufacturing- Morgan Ins– Liberty Mutual

CGL, Auto, Umbrella

$136,186

Personal Lines- YTD through September 2022

<u>Personal Lines TWP $5,112,416</u>

New Business = $545,508

Renewal* = $4,460,874

*Renewal includes premium from account book rolls & AORs

Kim Cole, CPRM, ACSR
PL Account Executive
Direct: 512.729.6121
kim@combinedagents.com

Kim Cole

Personal Lines Submissions- August to October 2022

Obstacles & Challenges

Carrier/Member Book Rolls

Added New Carrier- Vault

Incomplete Submissions

Endorsement Processing/Responsiveness

Rate Increases & Claims

Carriers- High Net Worth PL

Procedure Changes Implemented to overcome challenges- PL

- New Business Submissions
- Change Requests and Endorsement Processing – Added Processor Role
- Resources to Staff

2023 CAAIS Goals

GROW: Increase Quote to Bind Ratio

Staff Education & Resources

Vendor Partnerships: Tarmika & Patra

Request member review of E&S/ brokerage business- can it be moved to standard/CAAIS?

Personal & Commercial Lines

2023 CAAIS Challenges

- Onboarding New Agencies
- Production Increase with no increase to CAAIS staff
- Loss of members and premium $$

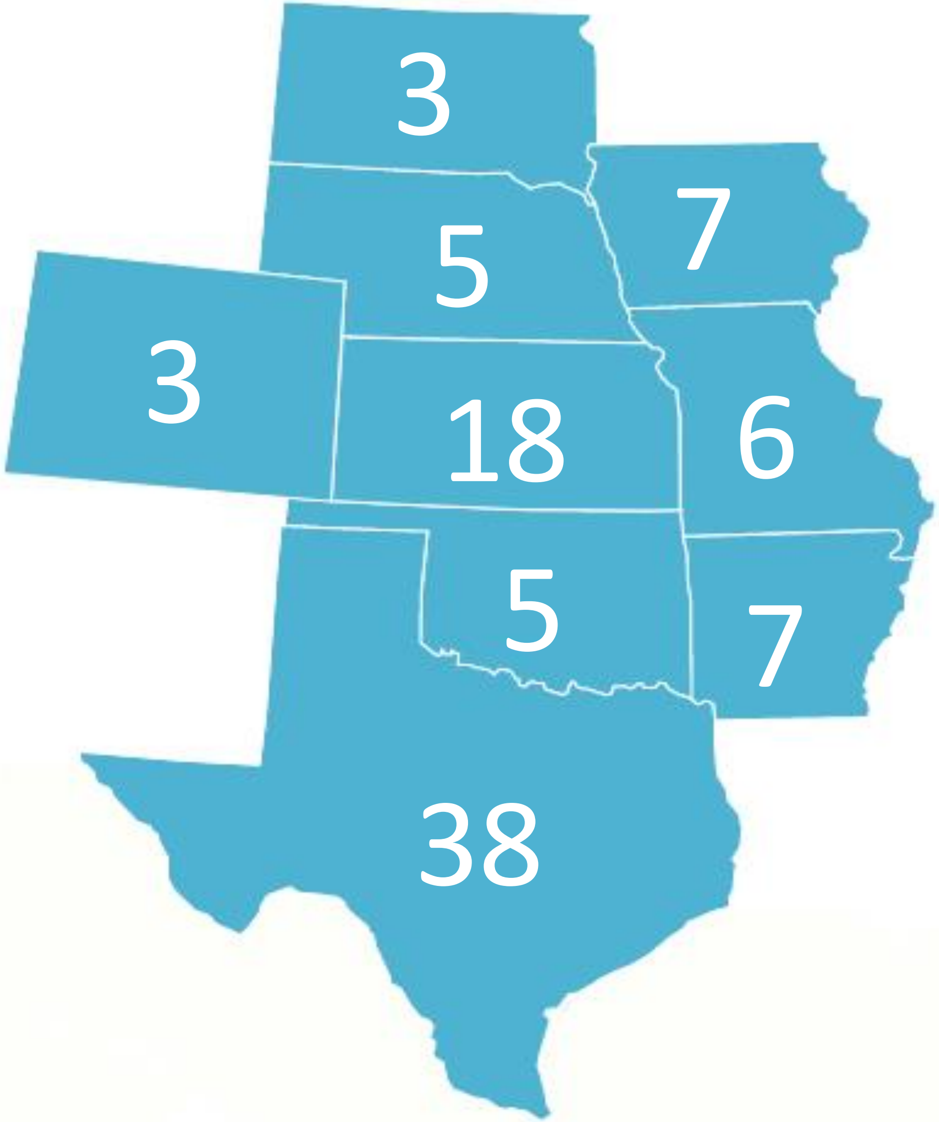
VP of Insurance Services, Kelly Surles

Kelly Surles

Expansion & New Member Update

CAA Member Map

92 Total Agencies
9 States
23 New Members in 2022



Vendor & Carrier Partnerships

CAA Vendor Partners

AGENCY FOCUS
Carey Wallace

AGENCY KPI

APPLIED

CAA
PREMIUM FINANCE FUNDING

CareerPlug

G&A Partners
Time to grow.

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INSURANCE ADVOCACY NETWORK

LiveOakBank.

MARKET RETRIEVERS
CONSULTING

THE NATIONAL ALLIANCE
for Insurance Education & Research

PATRA™

TARMIKA

Vertafore®

CAA

enterprise rent-a-car

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NEPTUNE

TheLossRunPros

Lemonade

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propeller
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CAA

Applied Net

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Council Members

FOREMOST®
A Farmers Insurance® Company

INA

Texas Mutual®
WORKERS' COMPENSATION INSURANCE

AmTrust
FINANCIAL

Berkley Aspire
a Berkley Company

Liberty Mutual®
INSURANCE

AGENCY KPI

CAA

Dues Update

Member Dues Collection 2023

Q1 – March 1st

Q2 – April 17th

Q3 – July 17th

Q4 – October 16th

Quarter Invoice Includes:

Dues

$136 Capital Fee

$900 Technology Fee

State/Regional Meetings

Proposed Regional Meeting Locations
Spring 2023

Omaha, NE

Central Kansas

Branson, MO

Dallas, TX

San Antonio, TX

Future Meetings

Omni Las Colinas

Dallas, TX

July 12th – July 13t

2023

Hotel
Monteleone

New Orleans, LA

Nov 8th-Nov 9th

2023