

Ideal Member

- ✓ Commitment to Independence
- ✓ Local Ownership/Leadership
- ✓ Individual Entity
- ✓ Document Perpetuation Plan & Funding Mechanism
- ✓ Agency Management System: Applied Epic, Applied TAM, AMS 360, Nexsure
- ✓ Minimum Agency P&C Premium: \$12 Million
- ✓ Minimum Agency P&C Commission Revenue: \$1.5 Million
- ✓ Shares Agency data with CAA
- ✓ Shares Intellectual expertise with other members
- ✓ Committed to profitable growth
- ✓ Promotes CAA to others
- ✓ Engaged and involved in CAA
- ✓ Attends three CAA board meetings per year
- ✓ Commitment to aggregating with CAA core carriers and wholesaler