

**American  
Insurance  
Marketing  
Sales**



**The AIMS Society  
is a national  
organization  
dedicated to  
providing  
interactive  
marketing and  
sales training,  
ongoing resources  
and networking  
opportunities to  
insurance  
professionals.**

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[www.aimsociety.com](http://www.aimsociety.com)



**AIMS Society**

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**Why Belong to the AIMS Society?**

“Why AIMS? There are many reasons from my perspective:

- It is an organization that I can turn to as a company person to help my underwriting and marketing staff become more proficient in their sales / relationship building efforts.
- It is an organization that cares about its members.
- It is an organization that makes an active effort to ensure that its sales training material is current and takes into consideration today’s agency sales approaches.
- It is a sales training organization that is managed by agents for agents.”

**- Curt Pearsall CIA, CPCU, AIAF, ARM, AU, Utica Mutual Insurance Co.**

“The most important reason to belong is the people. Only those interested and dedicated to the professional sales process need apply.... anyone not very committed will fade away so as a member you always know that other active AIMS Society members share your interest and dedication.” - **Keith A. Savino, CIA, Warwick Resource Group, Warwick, NY**

“The CIA designation program has helped me vastly improve my sales skills. It has opened a large network of agents who are now friends and who I can call upon for help, and who I have and will help. In addition, I have had a lot of fun at the annual *PRO-to-PRO*.” - **Martin A. Lebson, CIA, AAI, ARM, Capacity Coverage of New Jersey, Inc., Mahwah, NJ**

“The AIMS Society is the premiere association for sales and marketing, providing the training tools I need with the long-term follow up that assists with me in being successful day to day. AIMS is always there for me....it started with the *CIA designation program*, and continues with regular e-mail updates on sales and marketing tips.” - **Martin Taylor, CIA, The Hartford, Hillsborough, NJ**

“RELATIONSHIPS! Being able to call upon fellow agents and learn from their experiences, having access to marketing and sales training techniques and ideas, which will only enhance the value added services provided to our clients -- That's why I belong.”  
**Ron D. Stauffer, CIA, Phelan Insurance Agency, Inc., Versailles, OH**

“The AIMS Society’s PRO-to-PRO Executive Retreat gives us the opportunity to step back and review and re-energize our sales and marketing efforts. Every year I return home with excellent ideas from hearing and sharing suggestions for success from some of the best minds in our industry.” - **Milton Lagasse, CIA, Treadwell & Harry Insurance Agency, Memphis, TN**



# AIMS Society Can Add Value to Your Sales-Focused Organization

## Membership

All levels of AIMS Society membership help to build strong selling skills among insurance agency producers, support staff and insurance company personnel. AIMS Society membership also means a nationwide network of producers who are focused on increasing personal and agency production.

Select the membership benefits package that best suits your needs:

**e-SSOCIATE MEMBERSHIP** (an introduction to the AIMS Society) - **\$95 per person, annually** - Get a taste of all the AIMS Society has to offer the property/casualty insurance sales professional. At this level, you will be given a password that provides access to all AIMS Society Online services.

**INDIVIDUAL/DESIGNEE MEMBERSHIP - \$225 per person, annually** - Individuals who have completed the Certified Professional Insurance Agent (CPIA) designation program are eligible to join the Society at this level. In addition to online membership benefits, Individual/Designee Members receive the option to receive *Quik Sales Tip* and *Bright Ideas from the AIMS Society* publications directly via e-mail or fax; an annual subscription to the AIMS Society's special version of *Agency Ideas* newsletter; periodic updates on uses of technology in sales in cooperation with *The Automated Agency Report*; the opportunity to get involved on committees and on the Board; and voting privileges during the Society's Annual Meeting of Members.

**AGENCY MEMBERSHIP - \$750 per agency with 1-4 producers; \$1175 per agency with 5-10 producers** (custom pricing for over 10 producers) -

The AIMS Society Agency Membership provides access to all of the above, and in addition includes *The Agency Online* – Rough Notes' 24/7online access to an easy-to-navigate, password-protected sales and service source. Professional resources available include:

- Policy Form & Manual Analysis Service (PF&M)
- *Insurance Words & Their Meanings*; and *Coverages Applicable*
- Producers' Commercial Risk Assessment Survey
- e-marketing tools for agencies
- *Business Building Letters*
- *The Insurance Marketplace*

## The CPIA Designation—Interactive Marketing & Sales Training

The AIMS Society offers a series of seminars that lead to the Certified Professional Insurance Agents (CPIA) designation:

- **Position for Success** (CPIA 1) – addresses “before the sale” techniques for effective prospect identification and niche market development
- **Implement for Success** (CPIA 2) – provides key “during the sale” risk management, fact-finding and proposal development concepts
- **Sustain Success** (CPIA 3) – promotes systematic “after the sale” methods for ongoing account development and customer service

These one-day seminars offer a hands-on, how-to approach to learning. Seminars are offered through educational organizations, professional associations and insurance companies throughout the country. Continuing education credit is available in most states.



## Networking

At the **Annual PRO-to-PRO** you'll have the opportunity to spend face-to-face quality time with other decision-makers exploring cutting edge solutions to resource management for your organization.

Valuable workshops, enthusiastic networking and idea-sharing events, and rejuvenating free time will allow you to renew, revive and re-energize you and your business. Take time out to work “on” your business instead of “in” it! Your personal issues and concerns will be addressed in this focused yet relaxed atmosphere.

## Ongoing Resources

- Membership Directory & Networking Guide—in print and online; provides access to a tremendous network of agents and brokers across the country
- *Agency Ideas* newsletter—six times annually and online “extras”
- Regular Sales, Marketing, Management and Motivational Tips – e-mail, fax and online library
- *Managing for Success* behavioral profiles to assist with hiring and staff development
- Marketing system software discounts
- Utica E&O discounts for CPIA Designees



## How to get involved

- Membership (Join Today!)
- Seminar and/or PRO-to-PRO Sponsorship
- Seminar participation to achieve the CPIA designation ( visit [www.aimsociety.com](http://www.aimsociety.com) for a current copy of the National seminar schedule)

## Membership Application

Complete the following and return it to the AIMS Society, PO Box 35718, Richmond, VA 23235 with your membership dues; or fax application with credit card information to 703/579-8896.

Name (First, MI, Last)	Designations
Firm Name	
Mailing Address	City / State / Zip
( ) Business Phone #	( ) Business Fax #
E-mail address	Website

## Membership Options:

- |   |          |          |
|---|----------|----------|
| <input type="checkbox"/> e-ssociate Membership            | @ \$ 95  |          |
| <input type="checkbox"/> Individual / Designee Membership | @ \$225  |          |
| <b>Agency Membership</b>                                  |          |          |
| - 1-4 producers   | @ \$750  |          |
| - 5-10 producers  | @ \$1175 | \$ _____ |

## Indicate the Additional Membership Items You'd Like to Receive:

- |   |  |          |
|---|--|----------|
| <input type="checkbox"/> CPIA Wall Plaque – new design! - black background with blue and gold CPIA logo – usually \$55                        | \$52 when ordered at the time of application | \$ _____ |
| <input type="checkbox"/> CPIA logo pin – gold – usually \$23  | \$21 when ordered at the time of application | \$ _____ |
| <input type="checkbox"/> CPIA logo coffee mug – new! 17 oz. white ceramic exterior w/logos and cobalt blue interior and handle – usually \$15 | \$13 when ordered at the time of application | \$ _____ |

**Total Amount Due:** \_\_\_\_\_

- Enclosed please find my check made payable to the "AIMS Society".
- Please charge my credit card:  MC  VISA  AMEX
- Credit Card #: \_\_\_\_\_
- Exp. Date: \_\_\_\_\_
- Name as it appears on the card (please print): \_\_\_\_\_
- Signature: \_\_\_\_\_ Date: \_\_\_\_\_