



Independent Insurance Agents' Association of Montana

3131 Dredge Drive, Helena, Montana

email application to: education@iiamt.org | www.iiamt.org

Agency Member Application for July 1, 2023 – June 30, 2024

Renewal Due August 1, 2023

Agency Name: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Main Contact: _____ Phone: _____

Agency FEIN/Tax ID: _____ Email: _____

Website: _____

Dues Calculation

Employee Definition: IIAM dues are based on the total number of persons working in the property & casualty insurance business for your agency twenty (20) hours or more per week. This includes those working in an insurance capacity as stockholders, partners, individual proprietors, licensed persons, and all other employees who work for your agency as stated above.

Number Employees	1-2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Dues	\$489	\$641	\$793	\$945	\$1097	\$1249	\$1401	\$1553	\$1765	\$1917	\$2069	\$2221	\$2373	\$2525	\$2677

If more than 16 employees, please use this formula:

$$\$2,677 + (\$16 \times \text{the number of total employees}) = \text{Total Annual Dues.}$$

Dues are capped at \$6,000.

TOTAL NUMBER OF EMPLOYEES: _____

TOTAL DUES: \$ _____

I certify that the total number of employees is accurate. I have read the Trusted Choice License Agreement (available at www.trustedchoice.com/licenseagreement) and the Pledge of Performance (www.trustedchoice.com/about-us/pledge-of-performance).

Send me a TrustedChoice window cling.

Enclose the following documents with payment or email to processing@iiamt.org:
Proof of E&O
Corporate License
Writing Agent Licenses
W-9
EFT Authorization Form*
(*For commission payments)

Signature: _____

Date: _____

How to Pay

Due Date:	8/1/2023
Make Checks Payable to:	IIAM
Mail to:	IIAM, 3131 Dredge Drive, Helena MT 59602

Dues include membership in the Independent Insurance Agents & Brokers of America. Dues to Independent Insurance Agents' Association of Montana are not deductible as a charitable contribution but may be deductible as an ordinary and necessary business expense. 11% of the dues, however, is not deductible as an ordinary and necessary business expense to the extent your Association engages in lobbying



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Branch Locations

Please include with your application. Duplicate as needed.

Branch 1: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Main Contact: _____ Phone: _____

Email: _____

Branch 2: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Main Contact: _____ Phone: _____

Email: _____

Branch 3: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Main Contact: _____ Phone: _____

Email: _____