Northern California, Nevada, and Utah (NCNU)

Suna Taymaz, Vice-President, Corporate Strategy

The Road Ahead
1914

OFFICIAL HIGHWAY MAP
OF CALIFORNIA
AND WESTERN NEVADA
1917

ATTORNEY AND APPLICATION FOR AUTOMOBILE INSURANCE
TO THE CALIFORNIA STATE AUTOMOBILE ASSOCIATION
INTER-INSURANCE BUREAU
AGAINST THE HAZARDS INDICATED [X] BELOW

<table>
<thead>
<tr>
<th>HAZARDS in the State of California</th>
<th>AMOUNT</th>
<th>PREMIUM</th>
<th>TOTALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fire and Transportation</td>
<td>$2,100</td>
<td></td>
<td>$2,100</td>
</tr>
<tr>
<td>Theft</td>
<td>$1,000</td>
<td></td>
<td>$1,000</td>
</tr>
<tr>
<td>Collisions ($25, deductible)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collisions (full coverage)</td>
<td></td>
<td></td>
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<tr>
<td>Property Damage</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Totals</td>
<td>$2,100</td>
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</tr>
</tbody>
</table>

Date: July 6

Nicholas H. Muller

Power of Attorney and Application for Automobile Insurance
To the California State Automobile Association
Inter-Insurance Bureau

Witneses:

Chalmers

[Signature]
AAA ADOPTED WHICH INNOVATION(S) EARLY?

- Car-Sharing
- Safety Technology Simulations
- Live Road Traffic Conditions
- Mobile Engine Diagnostics
AAA NCNU TODAY

THE LARGEST AUTO CLUB IN THE WORLD

1.2 MILLION SQUARE MILES

5.6 MILLION MEMBERS

1 IN EVERY 5 CALIFORNIANS
AAA IN THE US AND ABROAD

~30 FEDERATED US CLUBS

60+ INTERNATIONAL CLUBS
OUR WORLD IS CHANGING...
DISRUPTIVE TRENDS

CAR OWNERSHIP
30% of Millennials do not plan to purchase a car in the near future

CAR USAGE
The average car is in motion for only 60 minutes per day

CAR SHARING
The car sharing and ride sharing market is predicted to exceed $30B by 2024

RIDE SHARING
MILLENNIAL TRENDS

23%  14%  65%
DECLINING EMERGENCY ROAD SERVICE USAGE

Source: AAA National ERS usage statistics
OUR VISION FOR TRANSPORTATION IS TO ACCELERATE THE AUTONOMOUS, CONNECTED, ELECTRIC AND SHARED FUTURE
AAA SURVEY ON AUTONOMOUS VEHICLES

• 75% of U.S. drivers would be afraid to ride in a self-driving vehicle
• 54% would feel less safe sharing the road with self-driving cars
• 59% want autonomous technology in the next vehicle they buy or lease, while 25% would not want the technology
THE CAR ECONOMY

SHARED

CONNECTED

ELECTRIC

AUTONOMOUS

ACES
A KEY POINT OF ENTRY
MOBILE REFUELING: NEW OPPORTUNITIES

BEV/FCEV

FLEETS

SELF-DRIVING?
CONNECTED CARS

SMARTtrek (ARIZONA ONLY)
- SIMPLE ONLINE DASHBOARD
- REAL-TIME VEHICLE HEALTH ALERTS
- DRIVING FEEDBACK
- MAINTENANCE REMINDERS
AUTONOMOUS

FOCUS ON OUR MEMBERS

ACCELERATE THE TRANSITION

UNCOMPROMISING SAFETY
OUR ROLE IN THE FUTURE OF MOBILITY

Innovate in Insurance

Safety

Advocate

Regulation

Connected Car Applications

TaaS Provider

Fleet Ops

Innovate in Insurance

Strategic Partnerships

Voice of Consumer

Connected Car Applications

TaaS Provider

Fleet Ops

Innovate in Insurance

Strategic Partnerships

Voice of Consumer
THANK YOU