

13th Annual

# TMPAA Summit

Where Program Business Gets



# Vendor Services

TARGET  MARKETS

Program Administrators Association

**October 21-23, 2013**      **Scottsdale, Arizona**



**TARGET**  **MARKETS**  
Program Administrators Association

*Where Program Business Gets Done*

13th Annual Summit Attendees,

TMPAA Vendors play a critical role in many areas of support and service to our membership.

To each member in this 2013 Summit Vendor Book, and others in the Association, we reach out to extend our sincere appreciation for your ongoing support of the TMPAA and provide special thanks for companies that have also sponsored part of this event. While the services and products you offer already generate significant interest on the part of our meeting attendees, we have added some additional incentive this Summit with the \$1,000 Trade Show Challenge. We hope this will produce further business opportunities for your company.

On behalf of the TMPAA Advisory Board and staff, I hope every attendee has a profitable meeting and benefits from the investment you have made in the TMPAA.

Thank you,



Ray Scotto  
Executive Director  
TMPAA



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# **ACTUARIAL SERVICES**

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**OVERVIEW OF COMPANY**

Milliman is among the world’s largest independent actuarial and consulting firms with over 50 offices throughout the world including 30 within the U.S. We are in the business of evaluating risk and the opportunities involved in evaluating risk in the property-casualty, life, health and employee benefit fields. Milliman works with program managers, insurance/reinsurance companies, governments and self-insureds. We take great pride in our professionalism and independence and will custom design our analysis to meet the needs of your program. We are a proud sponsor and subject matter expert of the Target University Actuarial course. An additional contact is Mike Blivess at mike.blivess@milliman.com Ph:610-975-8020.

**PRODUCTS & SERVICES**

Milliman’s analysis of your program’s loss experience, including predictive analytics, can assist you in understanding the drivers of profitability and in obtaining insurance and reinsurance company support for your program. If the program is in a separate insurance company or captive cell, loss reserve projections may be needed for financial reporting and an actuarial reserve opinion may be required. In addition to the actuarial services, Milliman consultants can provide assistance with product design, enterprise risk management, claim reviews, business planning, and claim and underwriting operational reviews.

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**OVERVIEW OF COMPANY**

Perr&Knight is focused on speed-to-market initiatives for our clients. We are a leading provider of insurance support services and a strategic resource that companies utilize to reduce their fixed costs while increasing the efficiency and value of their insurance operations. Our services include Actuarial Consulting, Competitive Intelligence, Data Services, Insurance Technology, Regulatory Compliance, and Risk Services, including Captive Management. We work with insurance carriers, program administrators, managing general agents, brokers, self-insureds, public entities, and other intermediaries located throughout the United States and abroad.

**PRODUCTS & SERVICES**

- RateFilings.com, the largest database of competitor filings nationwide
- Over 35 actuaries and regulatory compliance consultants who specialize in pricing insurance products, developing forms, and licensing producers
- A state filings group that is the largest provider of rate, rule and form filing services in the country
- Proven capabilities to optimize critical insurance operations, including insurance technology consulting, statistical reporting, and monitoring of circulars and publications
- A comprehensive risk management suite of services, including full back-office services for captives

# **CLAIMS MANAGEMENT**



### **ATHENS ADMINISTRATORS**

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### **OVERVIEW OF COMPANY**

Founded in 1976, Athens Administrators delivers superior claims administration services and support with the highest level of personalized attention. We provide businesses in need of Program claims administration services with specialized Program solutions designed to meet the unique needs of their organization and industry. The components of our Program business claims administration solutions enable the delivery of superior results that directly impact the bottom line such as 100% client retention, dedicated adjusters, an average of 14 years of experience per examiner and national capabilities.

### **PRODUCTS & SERVICES**

Our Program Claims Administration Specialties include, but are not limited to:

- Commercial IM
- Courier, Delivery, Taxi
- Facility Services
- Heavy Equipment (Crane, Excavator, Lifts)
- Maintenance Equipment
- Pest Control



### **BERKLEY RISK**

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### **OVERVIEW OF COMPANY**

Berkley Risk is a provider of insurance management services; we design, implement and manage a wide variety of programs to help our customers reduce the cost of risk. We deliver all specialty-insurance services as an integrated package or on an unbundled basis to drive down the total cost of risk for our client's programs. Increased control over your risk management program creates stability and builds profitability for you.

### **PRODUCTS & SERVICES**

We apply best-practice standards in all functional areas of an alternative market insurance enterprise to support the mission of each customer program, pool, group, captive and other self-insured solutions. Services include underwriting/rating, reinsurance, loss prevention, claims management, finance, actuarial, sales, marketing, strategic planning, board governance and overall program management.



**CARL WARREN & COMPANY**  
Claims Management and Solutions

**CARL WARREN & COMPANY**

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**OVERVIEW OF COMPANY**

Carl Warren & Company is a national, employee-owned Third Party Claims Administrator with 36 locations strategically placed nationwide. Our focus is on the fair, efficient, and responsive resolution and administration of claims. Since 1944 we have been providing Gold Level Claim Service to program administrators, carriers, private corporations and public entities. We were recently recognized as the 2013 National ESOP Company of the Year.

**PRODUCTS & SERVICES**

Third Party Claims Administration - Our claims handling expertise is in General Liability, Automobile, Workers' Compensation, Construction Defect, Property, Professional and Products Liability, Wrongful Acts, and Employment Practices. We also handle Program Administration, Litigation Management and Subrogation for our clients.



**CBCS, INC.**

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**OVERVIEW OF COMPANY**

CBCS is an independent Third Party Administrator with national workers' compensation and liability claims capabilities. Our highly skilled professionals work closely with clients throughout the claims management process. CBCS has been handling P&C claims for over 30 years. Providing superior claims service for large deductible, self-insured, program managers, and captive clients. Our transparent business model combined with client results have produced a 98% client retention rate.

**PRODUCTS & SERVICES**

Our team of trained and licensed adjusters administer claims for: Workers Compensation, Auto Liability, Liability, and Motor Freight Cargo. In addition, our in-house Nurse Case Management team maintains case momentum and guarantees a consistent strategy throughout the continuum of care. Our professional staff is bound by the standards and ethics of the certification they hold. Our dedicated and centralized approach delivers one of the most effective and responsive TPA models in the industry.





**EMPIRICAL LOSS MANAGEMENT, LLC**

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**OVERVIEW OF COMPANY**

Empirical Loss Management LLC is a provider of Niche, Specialty Claim Administration, Litigation Management, Audit, Oversight and Commutation Services to Reinsurers, Insurers and Qualified Self Insureds operating within the United States. Empirical has offices in Los Angeles, California, New York City, New York and Oklahoma City, Oklahoma, with our sister company, Turnstone, offering similar services operating outside of London, UK.

**PRODUCTS & SERVICES**

Niche, Specialty Claim Administration specializing in Construction Defect, Litigation Management and complex GL matters. We also provide audit oversight and commutations and commutation services to a variety of clients.



**ENGLE MARTIN & ASSOCIATES, INC.**

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**OVERVIEW OF COMPANY**

Engle Martin & Associates, Inc. is a national multi-line TPA/claims management and loss adjusting company. Engle Martin is privately held and led by working partners involved in day-to-day business activities, resulting in quick decision making and innovative, tailored claims solutions. The firm is committed to meeting the ever-changing demands of the insurance industry and to delivering consistent, quality claims service. Engle Martin Claims Administrative Service’s internal controls are certified as SSAE 16 Type II compliant.

**PRODUCTS & SERVICES**

Engle Martin & Associates, Inc. provides comprehensive property and casualty third-party administration (TPA) and loss adjusting services including: Commercial Property, Casualty, Transportation, Subrogation and Recovery, Specialty Lines, and Litigation Management. The firm delivers services to Program Administrators, Captive Managers, Insurance Carriers and Self Insured Entities. Engle Martin offers 24/7 online access to claims data, customized loss run reports, client audits, and dedicated adjusters matched with each program based on client industry and unique business needs.



## **GALLAGHER BASSETT SERVICES, INC.**

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### **OVERVIEW OF COMPANY**

In today's world of Risk Management, success depends on going beyond the expressed needs of a customer and concentrating on the basic needs of people. We at Gallagher Bassett partner with our clients to give their people the service, dignity, care and results they deserve in a TPA - superior outcomes, unsurpassed claims handling, customized solutions and quality worldwide.

### **PRODUCTS & SERVICES**

Services offered: Claims Management, Information Management, Medical Cost Containment (Managed Care), Consultative Services (Risk Control Consulting, Appraisal Services).

Product Lines: Workers Compensation, Liability (Auto, General, Products, and Professional), Property, Integrated Disability Management, Longshoreman and Jones Act, Texas Non-Subscriber.



## **KINGSTREE GROUP**

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### **OVERVIEW OF COMPANY**

Kingstree Group is a nationally recognized leader in providing workers compensation medical case management services to programs, employers, captives and carriers. We are the pioneers and experts in early intervention and controlling over-utilization of medical services from day one through closure of each case.

Kingstree Group is a genuine partner to its clients, the stake holders, which is why they dictate to their claim administrators that we are the first point of contact in the each report of injury.

### **PRODUCTS & SERVICES**

Kingstree Group provides the following services nationwide:

- MyCare24—a 24 hour nurse injury hotline
- 800 Reporting
- Triage
- Telephonic case management
- Field case management
- Return To Work programs



## **NORTH AMERICAN RISK SERVICES, INC.**

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### **OVERVIEW OF COMPANY**

North American Risk Services (NARS) is a premier third-party claims administrator that is dedicated to producing the best possible results for our clients. Founded in 1996, we handle claims for insurers, brokerages, managing general agencies, reinsurers, liquidation bureaus, self-insured funds and entities.

Our claims professionals are among the industry's most experienced, and our technology is unsurpassed.

Our vision is to be the industry leader by providing the highest quality claims services with the best possible outcomes for our customers.

### **PRODUCTS & SERVICES**

NARS maintains the philosophy that our people are our most valuable resource. We have senior level adjusters with experience in handling virtually all types of claims in practically every jurisdiction in the United States with dedicated units for Workers' Compensation, Transportation, Commercial Liability, Construction Defect, Property, and Homeowners as well as a dedicated Quality Assurance Department, dedicated Special Investigations Unit, dedicated Recovery Unit, and provide expertise in Catastrophe Management.

## **PARADIGM**<sup>®</sup> **OUTCOMES**

### **PARADIGM OUTCOMES**

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### **OVERVIEW OF COMPANY**

Paradigm Outcomes is the nation's leading provider of catastrophic and pain case management services. Their proprietary methodology ensures the best care by the best providers and delivers improved clinical results along with significant savings for workers' compensation carriers and program administrators. Paradigm is the only company to offer financial and medical outcome guarantees for acute claims. Paradigm caps its clients' medical cost exposure, shares the risk, and offers financial certainty on the most volatile cases.

### **PRODUCTS & SERVICES**

- Outcome Plans for acute catastrophic injuries such as traumatic brain injuries, spinal cord injuries, multiple traumas, amputations and burns.
- Complex Large Loss Plans for legacy cases with persisting conditions such as chronic wounds, repeated hospitalizations and escalating medical needs.
- Pain Management for emerging or chronic pain conditions such as fibromyalgia and failed back syndrome.
- Portfolio Medical Management for guaranteed reserve reductions on an entire portfolio of complex large losses and pain claims.



## **RAPHAEL AND ASSOCIATES**

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### **OVERVIEW OF COMPANY**

Raphael and Associates is a Third Party Administrator and claims adjusting company based out of Rutherford, New Jersey. We have additional offices in New Jersey, New York, Pennsylvania, Alabama, Florida, Georgia, and Michigan. Since 1978 Raphael and Associates has provided claims administration & claim adjusting services across all lines of business that have exceeded the expectations of our clients.

### **PRODUCTS & SERVICES**

Our services are extremely flexible. We will follow your specific handling instructions and guidelines or conduct full and complete adjustments... the choice is yours. We have licensed & highly trained adjusters that are experienced in the following areas; Commercial/Homeowners Prop & Liab., General Liability, Professional Liab., Cargo, Auto/truck Liab. & Appraisals, Intermodal Trans., Ocean & Inland Marine, Liquor Liab., Garage Keepers Liab, Saddle Animal, Special Events Liab., Mobile homes, Jewelers Block, E & O, Subrogation Recovery, WC, Motor Freight & Long Haul.



sedgwick®

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### **OVERVIEW OF COMPANY**

Sedgwick Claims Management Services, Inc. is the leading North American provider of innovative claims and productivity management solutions. Sedgwick and its affiliated companies deliver cost-effective claims, productivity, managed care, risk consulting, and other services to clients through the expertise of nearly 10,000 colleagues in 190 offices located in the U.S. and Canada.

### **PRODUCTS & SERVICES**

Sedgwick specializes in workers' compensation; disability, FMLA and other employee absence; managed care; general, automobile and professional liability; warranty and credit card claims services; fraud and investigation; structured settlements and Medicare compliance solutions. Sedgwick and its affiliates design and implement customized programs based on proven practices and advanced technology that exceed client expectations.



### TRISTAR RISK MANAGEMENT

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#### OVERVIEW OF COMPANY

Since 1987, TRISTAR Risk Management has provided excellent third party claims administration, loss control, medical management and benefit administration services nationwide. Through our 44 offices with over 1,000 employees, we manage claims on behalf of captives, program managers, insurance companies, reinsurers and self-insured corporations and public entities. We combine proven claim fundamentals with flexibility and freedom to customize. Our comprehensive approach is designed to support your long term success. TRISTAR—leading with integrity, delivering results!

#### PRODUCTS & SERVICES

TRISTAR offers a wide array of services, both bundled and unbundled, all focused on reducing customer loss costs. These services include: Claims Management, Workers’ Compensation, General Liability, Auto Liability, Professional Liability, Property Liability, Bill Review, Case Management, Risk Control, Litigation Management, Special Investigations, Subrogation, and Risk Management Information Systems.



### VERICLAIM, INC.

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#### OVERVIEW OF COMPANY

vrs vericclaim provides unsurpassed adjusting and claims management services to the risk management and insurance communities. Our comprehensive, customized, proactive approach enables clients to experience better, faster and more consistent claims settlements and reduced loss expenses. Insurers, reinsurers, wholesale brokers, captives, corporations and brokers rely on vrs vericclaim to deliver quality services to their own clients. We have over 120 locations in the US, and membership in vrs adjusters, the world’s premier global loss adjusting organization.

#### PRODUCTS & SERVICES

A SOC1 compliant TPA, vrs vericclaim provides comprehensive, highly customized claims management services. Our ability to insource field investigations, enables us to drive down a client’s total cost of program administration, while still maintaining quality service. Our account management teams work as accountable extensions of each client’s overall claims management effort, providing proactive, results-oriented claims administration and adjusting. Our Claims Management Division handles the following industries and specializations: General Liability, Professional Liability, Auto Liability, Products Liability, Subrogation and Litigation Management.



## **WESTERN LITIGATION, INC.**

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### **OVERVIEW OF COMPANY**

Western Litigation, Inc., f/k/a Professional Claims Managers (“WLI”) provides comprehensive claims, litigation management and program development services throughout North America. WLI specializes in professional liability and other specialty lines programs for MGA’s, insurance and reinsurance companies as well as self insured corporations, public entities, insurance pools and captives.

### **PRODUCTS & SERVICES**

WLI is a full service Third Party Administrator providing superior legal and technical knowledge to program administrators. We offer claims, litigation management and Program Administration Services. Complex programs we handle include: Health Care Liability, Private Detention Professional & General Liability, Insurance Agents Errors and Omissions, Home Inspector Errors and Omissions, Architects and Engineers Errors and Omissions, Miscellaneous Professional Errors and Omissions, Employment Practices Liability.



## **YORK PROGRAMS**

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### **OVERVIEW OF COMPANY**

York headquartered in Parsippany, NJ, is a premier provider of claims and risk management services to insurance carriers, program administrators, managing general agents, brokers, self-insureds, public entities and pools throughout the United States. Ranked nationally as the number 3 third-party administrator (TPA) based on annual revenue, York enjoys a loyal and growing client base and manages more than \$1 billion in reserves.

### **PRODUCTS & SERVICES**

York Programs utilizes experienced claims adjusters, skilled in handling first dollar claims, to help protect the profitability of more than 300 industry-specific niche programs. York also provides important ancillary services including risk control, policy issuance, subrogation, premium audit, catastrophe response and independent field adjusting. Clients enjoy access to their claims data through FOCUS, powerful, yet easy-to-use customer interface that allows them to view the risk information, analytics and a library of reports as well as create custom dashboards/reports. FOCUS supports York’s commitment to quality claims handling, proactive communication, transparent evaluation of claims and partnership with our clients.

Sometimes one  
wrong move...



We understand that managing claims can be a balancing act. For 69 years, we have been helping our clients identify problem areas and institute creative measures to control the cost of claims.

**Carl Warren & Company.** We do more than process claims, we help you reduce risk.

To find out about our award-winning, employee-owned company, contact Richard McAbee at (888) 858-2807, [rmcabee@carlwarren.com](mailto:rmcabee@carlwarren.com) or Larry Finn at (657) 622-4200, [lfinn@carlwarren.com](mailto:lfinn@carlwarren.com).



**CARL WARREN & COMPANY**

Claims Management and Solutions

PROVIDING QUALITY SERVICE SINCE 1944



# RAPHAEL & ASSOCIATES

OUR MISSION  
IS SIMPLE...

Providing outstanding service,  
extraordinary professionals  
and the best technology has to offer

## Who are we?

We are a TPA and claims adjusting company, internationally recognized for our exceptional service and unsurpassed reputation of nationwide claims handling.

## What we do?

We manage property and casualty claims programs throughout the United States. Serving as your claims department, we take great effort to seamlessly act as an extension of your company.



Let Raphael & Associates become your claims department. We understand the importance of adapting to the demands of the dynamic market and tailor our services to our clients needs.

## Find out more about us



(800) 466-9165



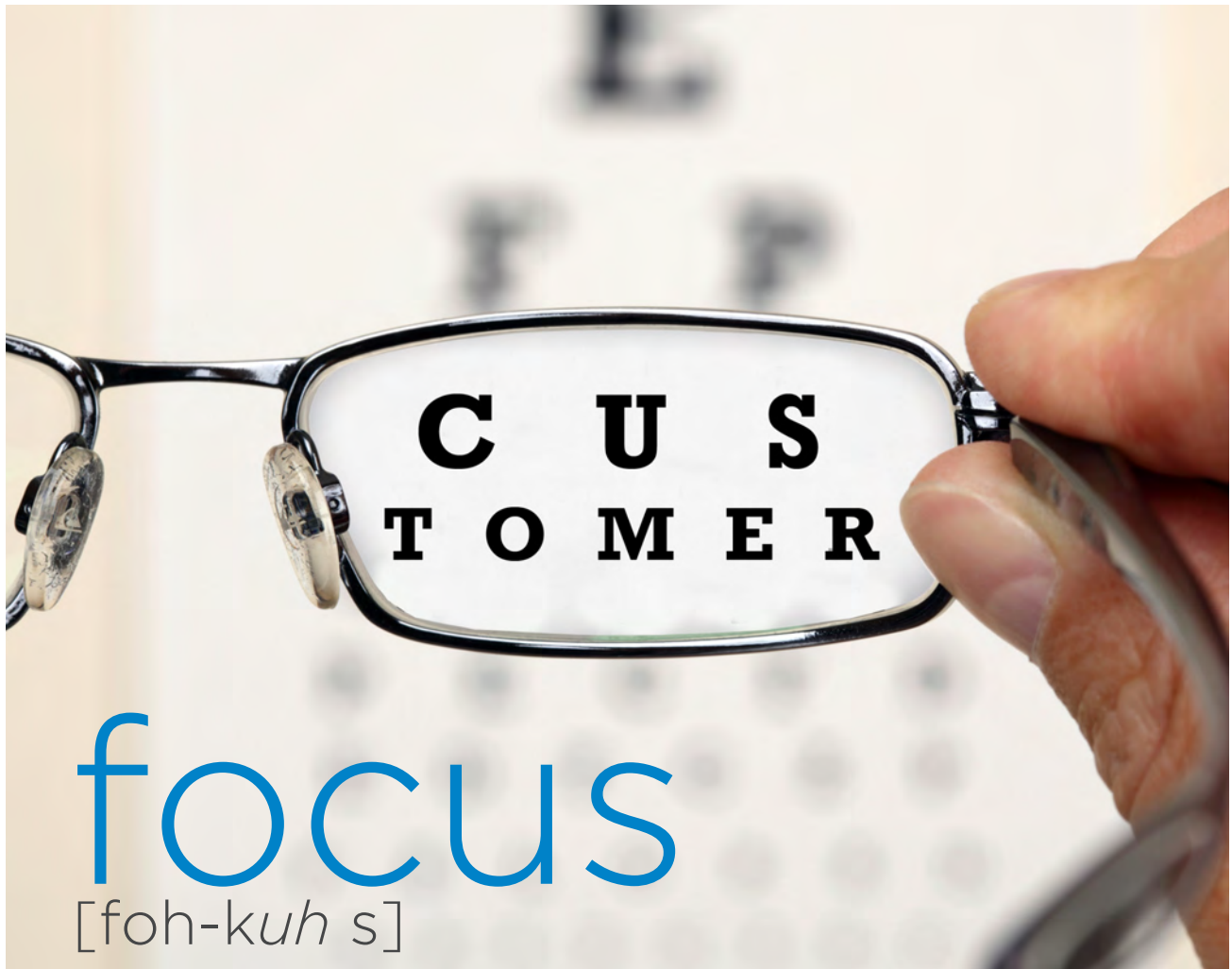
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301 Route 17 North, Suite 401, Rutherford NJ 07070





**To be clearly and sharply defined.**

***Focused on meeting your Programs needs.***

At York Programs, our focus on specialization allows us to build a detailed understanding of Programs and the customers we serve.

**Customized** claims services tailored to your program's culture, communication preferences, and preferred level of claims handling aggressiveness

**Dedicated** units of highly qualified and experienced Program adjusters who specialize in only your claims

**Focused** solutions from York Risk Control including customized risk assessments, consultative services, and premium audits designed specifically for Programs

**Introducing FOCUS.**

FOCUS is York's powerful, yet easy-to-use customer interface that gives you instant access to the risk management information, analytics and reports you want, exactly the way you want to see it.

To gain a better perspective on what York can do for your program, please contact, Lisa Arguello, at (973) 404-1215.



# **FINANCIAL SERVICES**

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**OVERVIEW OF COMPANY**

Nation's only insurance recovery collection firm who is SSAE No. 16 accounting certified and reaffirmed by AM Best as "Expert Recommended Service Provider." Earning global acclaim as the trusted choice for debt management resources by carriers, agents/brokers, program administrators, TPA's & Premium Finance entities large and small. Only collection agency maintaining libraries of bureau, NCCI/SCOPEs, ISO/PAAS manuals. Our audit proficiencies typically reduce insured requested re-audits to ZERO.

**PRODUCTS & SERVICES**

Commercial Insurance Niche Specialties

- All lines, ie. Workers' Compensation, General Liability, Professional/Executive Liability, Medical Malpractice, etc.
- Premiums - Audits (physical or estimated), Earned, Retrospective
- Claims - Deductibles, Overpayments, Subrogation
- Agent Debits

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**OVERVIEW OF COMPANY**

COST Financial Group, Inc., based near St. Louis, Missouri, was founded in 1989 and is the industry leader in providing premium finance company management services for agencies, agency groups, insurance companies, and wholesalers/MGA's who want to earn the profit from the financing they arrange. Our experience, technology, and expertise have enabled hundreds of clients to enjoy the benefits of owning their own premium finance company while COST manages their personal and commercial lines finance business.

**PRODUCTS & SERVICES**

COST Financial Group, Inc. manages and operates insurance premium finance companies for clients nationwide. The COST Program™ enables you to focus on your core business – running your insurance agency or company – while increasing profits, improving customer service, controlling the finance process, enhancing market value, creating a profit center for your business, and adding to your bottom line with no extra staff or fixed expense—while we do all the work!

## Dowling Hales

### DOWLING HALES

250 Park Avenue, Suite 2050  
New York, NY 10177  
www.dowlinghales.com

### COMPANY CONTACT

**Charles Norton-Smith**  
P +44 20 7256 3740  
cnorton-smith@dowlinghales.com

#### OVERVIEW OF COMPANY

Dowling Hales consistently ranks among the top advisors in insurance, having advised on over 139 completed transactions since 2008. Dowling & Hales, LLC, together with its broker-dealer affiliate, Hales Securities, LLC (member FINRA/SIPC), offers a broad scope of advisory services, including mergers & acquisitions, private placements of equity and debt capital, valuations, and due diligence review services to the insurance industry with specific expertise in the distribution sector. Dowling Hales was formed in 2011 through the acquisition of Hales & Company by an investor group led by V.J. Dowling and management of Hales & Company.

#### PRODUCTS & SERVICES

Dowling Hales offers a full suite of investment banking services, including mergers and acquisitions, private placements of equity and debt capital, valuations and due diligence services to third-party administrators, insurance distributors, wholesalers, underwriters and carriers. We have a deep understanding of the underwriting process and therefore of the Program Administrator and MGA world, where we are the leading firm advising on corporate strategy, capital structure and perpetuation.

## FIRST INSURANCE<sup>®</sup> FUNDING

A WINTRUST COMPANY

### FIRST INSURANCE FUNDING CORP.

450 Skokie Blvd, Ste 1000  
Northbrook, IL 60062  
Ph: 800-837-3707  
www.firstinsurancefunding.com

### COMPANY CONTACTS

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**Scot Feuerzeig** P 847-572-4602  
Scot.Feuerzeig@firstinsurancefunding.com

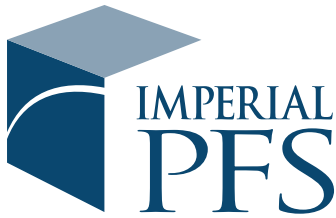
#### OVERVIEW OF COMPANY

Now one of the largest premium finance companies in North America, FIRST Insurance Funding Corp., based in Northbrook, IL, was incorporated in 1990 as a small, start up premium finance company. A few years later, FIRST merged with four local, community banks to form Wintrust Financial Corporation. Since then, FIRST has grown to a \$4 billion premium finance company with salespeople all across the U.S. and Canada.

#### PRODUCTS & SERVICES

In addition to providing premium finance services, FIRST offers its partners complete financial solutions which include:

- FIRSTDirect Customized Billing and Collecting Services
- FIRST Life Funding for high net-worth individuals
- Agency Training and Development Program
- Agency Perpetuation and Acquisition Lending



### **IMPERIAL PFS**

1055 Broadway, 11th Floor  
Kansas City, MO 64105  
Ph: 800-838-2350  
www.ipfs.com

### **COMPANY CONTACT**

**Jon Williams** P 800-638-1923  
jon.williams@ipfs.com

### **OVERVIEW OF COMPANY**

Imperial PFS is The Natural Choice® for premium financing, offering solutions for the commercial and personal insurance industry. For over 35 years, we have built solid relationships with our agency partners. Together, we've developed innovative services and flexible programs that provide additional resources to grow your business.

### **PRODUCTS & SERVICES**

The Imperial PFS Advantage:

- Flexible terms and fixed rate for length of loan
- Low minimum amount financed and no maximum
- Payment options including an online ACH or credit card payment, check by mail, automatic debit, IVR phone payment and more
- Online quoting and ease with account management



### **OAK STREET FUNDING**

11350 North Meridian Street, Ste 600  
Carmel, IN 46032  
www.oakstreetfunding.com

### **COMPANY CONTACTS**

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### **OVERVIEW OF COMPANY**

Oak Street Funding, a lender that provides financing exclusively to insurance professionals, understands the nature of intangible assets and unique financing opportunities. After lending hundreds of millions of dollars to the insurance industry, we have a strong track record in successful loans and 100 collective years of experience with carriers, reinsurers, program administrators, retail agencies, MGAs and wholesalers.

Oak Street Funding's large loans and expertise in terms, conditions and covenants can help craft the right debt structure for your capital needs. Contact us to see recent transactions and learn about financing options.

### **PRODUCTS & SERVICES**

Custom financing:

- Acquisition loans
- Succession loans
- Management recapitalizations
- Lines of credit
- Interest-only loans
- Working capital loans



**PREMIUM ASSIGNMENT CORPORATION**

3522 Thomasville Road, Suite 400  
Tallahassee, FL 32309  
Ph: 800-342-0991

**COMPANY CONTACTS**

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alvin.jones@suntrust.com

**OVERVIEW OF COMPANY**

Premium Assignment Corporation (PAC) is part of SunTrust Robinson Humphrey and is a wholly owned subsidiary of SunTrust Banks, Inc. SunTrust, with total assets of \$172.4 billion is one of the largest bank holding companies in the nation. PAC has specialized in meeting the insurance premium financing needs of insurance clients since 1961. PAC and is the fourth largest premium finance company in the nation. We look forward to assisting you.

**PRODUCTS & SERVICES**

PAC’s goal is: “Premium Financing Made Easy.” This is accomplished by providing state of the art technology to our clients. PAC has the ability to custom tailor premium finance options for any number of special programs. PAC provides extremely competitive interest rates for our clients and additional revenue opportunities as well. PAC’s nationwide sales force of proven veterans offers our clients the best of experiences while dealing with a leader.



**STERNE AGEE & LEACH, INC.**

277 Park Avenue, 24th Floor  
New York, NY 10172  
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**COMPANY CONTACT**

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byankus@sterneagee.com

**OVERVIEW OF COMPANY**

Founded in 1901, Sterne Agee is one of the oldest and largest privately-owned investment banking firms in the country, employing 1,300 professionals in 47 offices in 22 states. We are a nationwide, full service investment banking and brokerage firm, headquartered in Birmingham, AL. Our equities operation has approximately 80 institutional sales/trading professionals, while our fixed income business houses over 200 institutional sales/trading professionals. Our team of research analysts covers insurance companies along with many other financial institutions, in both the equities and fixed income divisions. Our retail brokerage division includes approximately 450 financial advisors and over 3,000 correspondent reps.

**PRODUCTS & SERVICES**

Our investment banking division provides: 1) Buy Side Advisory; 2) Sell Side Advisory; 3) Fairness Opinions; 4) Restructuring Advice and; 5) Full service capital raising capabilities in both the equity and fixed income markets. Our dedicated Financial Institutions team has extensive experience and expertise developed at both bulge bracket firms and FIG boutiques. In 2012, Sterne Agee completed 48 transactions, including M&A, equity and debt financing.



## **WEISERMAZARS LLP**

135W 50th Street  
New York, NY 10020

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## **COMPANY CONTACTS**

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### **OVERVIEW OF COMPANY**

WeiserMazars provides insight and specialized experience in accounting, tax and advisory services.

Since 1921, our skilled professionals have leveraged technical expertise and industry familiarity to create customized solutions to client challenges.

As the independent U.S. member firm of Mazars Group our global reach includes nearly 14,000 professionals in more than 70 countries.

### **PRODUCTS & SERVICES**

The WeiserMazars Consulting team assists and advises private and public organizations on how to best align their companies with organizational strategy and to enhance global performance through successful transformation. Based in C-level executive experience, we provide clients with a cost-effective blend of consulting, accounting, actuarial, auditing, claims, tax, technology and business process expertise that includes disciplined project management, sound methodologies, and extensive quality assurance.

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With hundreds of millions of dollars in loan originations exclusively to the insurance industry since 2003, we understand the capital needs of insurance businesses, their intangible assets and unique challenges. Our access to strong credit facilities gives us great capacity to provide larger, customized loans.

Ask about our **NEW Management Recapitalization** financing options for succession

 \$10,000,000 Revolving Credit Facility <b>APPALACHIAN UNDERWRITERS, INC.</b> September 4, 2012	 \$3,200,000 Acquisition Transaction <b>PRAM</b> June, 2013	 \$1,695,000 Acquisition Transaction <b>ELF Ventures, LLC</b> April, 2013	 \$1,950,000 Acquisition Transaction <b>Benefits Texas</b> July, 2013	 \$4,675,000 Acquisition Transaction <b>Scottish American Capital</b> December, 2012	 \$1,400,000 Management Buyout <b>Platinum Benefit Consulting Group</b> July, 2013
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1-866-OAK FUND | [oakstreetfunding.com/Journey](http://oakstreetfunding.com/Journey)



See recent transactions or contact an experienced team member:  
Todd Gray 317-428-5153 [todd.gray@oakstreetfunding.com](mailto:todd.gray@oakstreetfunding.com)  
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Chris McAtee 317-428-3829 [chris.mcatee@oakstreetfunding.com](mailto:chris.mcatee@oakstreetfunding.com)  
Kirsten Petras 317-428-5156 [kirsten.petras@oakstreetfunding.com](mailto:kirsten.petras@oakstreetfunding.com)

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# Is Your “Brand” Communicating?

## Time for a Change?

Dated?

Dull?

Boring?



New!

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1. Does your **logo** stand out when compared to your competitors’ logos?
2. Do you have a **tagline** or does your current tagline reflect your brand’s personality?
3. Have you ever worked with a **branding specialist** to evaluate or develop your brand?

TMPAA’s Target Programs Marketing Services (TPMS) now offers a new service that can help refresh and rejuvenate your company’s brand messaging at a very affordable, one-time cost!

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Contact Reg Pierce, TPMS Director, to learn more and obtain a quote.

Reg.Pierce@targetmkt.com  
or call (302) 268-1009

# OUTSOURCING

**ePLACE SOLUTIONS, INC.**

410 W. Fallbrook Ave., Suite 105  
Fresno, CA 93711

Ph: 800-387-4468  
www.ePlaceSolutions.com

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**Elise Krause** P 559-261-9290  
ekrause@ePlaceInc.com

**OVERVIEW OF COMPANY**

In 1999, two attorneys started ePlace Solutions, determined to prevent lawsuits and mitigate losses related to insurance claims. Today, ePlace provides industry-leading risk management services that are (a) state-specific, (b) relevant to both large and small organizations, (c) intuitive, and (d) easy-to-use. These qualities result in high utilization by policyholders which, in turn, allows insurance companies to experience better loss ratios and brokers to sell/renew policies at a higher rate.

**PRODUCTS & SERVICES**

ePlace Solutions offers risk management services in connection with EPL & Cyber insurance policies. Both EPL and Cyber risk management services offer: (a) unlimited support by specialists with many years of practical experience in their field of study, (b) hundreds of state-specific policies, procedures and sample forms, (c) many training options (online programs, webinars, monthly training/awareness materials), and (d) easy-to-understand summaries of applicable federal/state laws. ePlace does not “upsell” the policyholders; all services are included and add value to the broker-client relationship.

**INSURANCE RECRUITING SPECIALISTS**

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Phoenix, AZ 85032

Ph: 866-658-4477  
www.TheBestIRS.com

**COMPANY CONTACTS**

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Brad@TheBestIRS.com

**Tom Bielicki** P 866-556-0169  
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**OVERVIEW OF COMPANY**

Insurance Recruiting Specialists (IRS) is the largest provider of temporary, temp-to-hire and direct hire insurance professionals in the US. Our operation is 24/7/365 to allow our clients and talent to reach us at all times. IRS specializes in placing individuals in the fields of Workers’ Compensation, Commercial Lines, Personal Lines and Catastrophe. We provide a valuable service for our clients, which allows them to focus on growing their business.

**PRODUCTS & SERVICES**

In 2012, we received the ‘Best of Staffing’ award for client and talent satisfaction. Less than 1% of staffing companies nationwide received this award. Our award winning and nationally recognized quality service allows our clients to operate with a full-steam-ahead mentality. While we handle the sourcing, hiring, benefits, payroll and placement of their staff, our clients are able to focus on their business and servicing their customers.



## MIS INSURANCE SERVICES

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## COMPANY CONTACTS

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**Dale Hanson** P 866-694-2084 x225  
dhanson@misinservices.com

### OVERVIEW OF COMPANY

MIS is an insurance services company that offers “Back Office Solutions” to Carriers, Program Managers and Managing General Agents. As a leader in the Business Process Outsourcing Field, our quality systems, professionally trained staff and experience in compliance and policy reporting is second to none. Our business relationships range from start up programs, regional MGA business to boutique services for large carriers servicing the PEO/staffing industries. We not only provide software solutions, we provide people solutions that can streamline your business processing execution while reducing your expense load and increasing customer satisfaction.

### PRODUCTS & SERVICES

The services provided today include online rating portals, policy issuance engine, regulatory reporting, electronic filing cabinet system, billing/invoicing and accounting trial balance reporting. Also available for Worker Compensation carriers are WCPol’s certification, training and execution, all data calls in all states as well as Unit Statistical and Detail Claims Information Reporting. Please call MIS today for a full listing of services available.



## RESOURCE PRO

1180 Ave. of the Americas, 16th Fl  
New York, NY 10036  
www.resourcepro.com

## COMPANY CONTACTS

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patrick@resourcepro.com  
**Donna Rose** P 212-297-7154  
donna@resourcepro.com

### OVERVIEW OF COMPANY

ReSource Pro is the premier provider of business processing solutions to the insurance industry. By delegating processing tasks to the specialists at ReSource Pro, you can free your team to focus on the work that you and your clients value most. We help your people do what counts.

### PRODUCTS & SERVICES

**Insurance Process Outsourcing**—Specialize in providing customized solutions designed to not only bend the cost curve down but to create new opportunities for increasing productivity rates and driving revenue growth.

**Real-Time Support**—Our “real-time” services allow you to have live access to your ReSource Pro team.

**Peak Staffing**—To support our clients during these peak periods, ReSource Pro provides seasonal staffing so that clients can scale up or down as their business needs change.

**Productivity Pro**—Developed a proven process improvement methodology by tailoring Lean Six Sigma concepts to the insurance industry.

# **PROGRAM BUSINESS SERVICES**



### **ALTAMONT CAPITAL PARTNERS**

400 Hamilton Ave, Suite 230  
Palo Alto, CA 94301  
Ph: 650-264-7750  
www.altamontcapital.com

### **COMPANY CONTACTS**

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jaltman@altamontcapital.com  
**Keoni Schwartz** P 650-264-7739  
kschwartz@altamontcapital.com

#### **OVERVIEW OF COMPANY**

Altamont is a \$500M private equity fund with expertise and interest investing in insurance and related industries. We look to acquire businesses or partner with management teams to acquire or recapitalize businesses for growth or to support strategic initiatives and changes.

#### **PRODUCTS & SERVICES**

We provide capital and expertise. Our operating partners have senior management experience in a range of top insurance and insurance services businesses.



### **AXIOM DEVELOPMENT**

130 Chalfant Road  
Glenmoore, PA 19343  
Ph: 610-331-0610  
www.axiomdevelopment.com

### **COMPANY CONTACT**

**Mike Shannon** P 610-331-0610  
mike@axiomdevelopment.com

#### **OVERVIEW OF COMPANY**

Axiom Development creates sustainable, over-achieving sales organizations. In addition to developing field sales (producers), Axiom Development is unique in our focus on production underwriters, typically in the intermediary marketplace comprised of MGA's, Wholesalers, Program Administrators and MGU's. Our ability to develop the "Production" in Production Underwriters has had a dramatic impact on our clients since 2008, including many active members of TMPAA.

#### **PRODUCTS & SERVICES**

Axiom Development offers:

- A. An objective third-party evaluation of the sales effectiveness of your organization
- B. A custom development program for both managers and producers/production underwriters using a "blended" learning model with both on-line and live training
- C. Systems and processes to track new business creating a predictive model for managing new business submissions and retail relationships
- D. A turnkey recruiting program to assist in the addition of new producers and production underwriters



**BILL IT NOW**

70 Essex Road  
 Westbrook, CT 06498  
 Ph: 203-623-3045  
 www.billitnow.com

**COMPANY CONTACT**

**Chris Smith** P 203-623-3045  
 chriss@billitnow.com

**OVERVIEW OF COMPANY**

Bill It Now is headquartered in Westbrook, Connecticut and has been providing billing service solutions to Insurance Carriers, MGA's, Program Administrators, and Captives for over 10 years. We are a third party billing administrator that is invisible to the insured, customizing everything from our website to all statements to match your company's branding. Our services support all aspects of your organization's billing needs. Our service is designed to handle your billing more efficiently and reduce your overhead at the same time.

**PRODUCTS & SERVICES**

Bill It Now offers billing solutions for Direct Bill, Agency Bill, Monthly Reporting and Pay as you go. We provide the service, technology, website, system updates, staffing, customer support, secure lockbox, bank accounts, etc. We function as an application linked to your current website. This will enable your company to accept credit card and ACH payments and allow the Carrier, MGA, Broker or the insured to see the details of each policy. Our service also handles all reconciliation for your company.

**INPUT 1, LLC**

21820 Burbank Boulevard, Ste 300  
 Woodland Hills, CA 91367  
 Ph: 888-882-2554 x2135  
 www.input1.com

**COMPANY CONTACTS**

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 cfarfaras@input1.com  
**Lori Chadwick** P 214-516-3151  
 lchadwick@gotoPremiumFinance.com

**OVERVIEW OF COMPANY**

Input 1 is a leading provider of products and services to the insurance industry with primary focus on the billing of property and casualty insurance premiums. We provide stability for the long run—with over 25 years of consistent growth and a staff of over 100 devoted solely to providing billing software, outsourced bill servicing, and premium finance programs to a variety of clients located throughout North America.

**PRODUCTS & SERVICES**

Input 1 provides unique services, including:

- Billing & Payment Services for installment billing, whereby Input 1 handles all or portions of the billing functions of an insurance company or program administrator
- Premium Finance Software for captive finance operations, allowing firms to run their premium finance companies in-house
- Fully integrated Point-of-Sale Financing Programs specifically tailored for program administrators and insurance companies that require no capital and can be implemented within days.



## **INTERNATIONAL INSURANCE CONSULTANTS, INC.**

645 SE 10th Street  
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## **COMPANY CONTACTS**

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### **OVERVIEW OF COMPANY**

International Insurance Consultants is an executive search firm established in 1981 that exclusively services the property and casualty insurance industry. We specialize in executive and technical searches. We have over 30 years working with Program Administrators, MGA's and Carriers in both admitted and non-admitted markets. We conduct confidential searches for our customers globally and are sought out for what are thought to be the most difficult positions to fill. Our staff are P&C insurance experts.

### **PRODUCTS & SERVICES**

We have an unparalleled understanding of the value of human capital and how to maximize its positive impact on your business. Our services include assistance with position development, responsibility review and analysis, job description creation and the identification of applicable professional requirements. We then partner with you and use our expansive experience and network, including a database that exceeds 35,000 insurance professionals that have been personally engaged by our firm to maximize your hiring opportunity.



## **ISLAND FINANCIAL INSURANCE ASSOCIATES, INC.**

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## **COMPANY CONTACTS**

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**Ms. Chris Cuffe** P 253-770-0283  
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### **OVERVIEW OF COMPANY**

Island Financial Insurance Associates, Inc. is the number 1 surplus line filing provider. We offer our filing service with agents/brokers/producers and program brokers in 40 states. We have been in business since 1996 and licensed as a nonresident surplus lines broker in 40 states.

**SURPLUS LINE FILING IS OUR ONLY BUSINESS.**

### **PRODUCTS & SERVICES**

Surplus Line filings in 40 states. Program administration and consultation.



### MARTIN & COMPANY

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### COMPANY CONTACTS

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### OVERVIEW OF COMPANY

Martin & Company is a nationally recognized leader in assisting carriers and program administrators with getting their product to market faster. With over 150 years of industry experience at our senior level we have the capacity to assist with new product launches, product enhancements and target market research. We've essentially built a model that can handle your product from initial development to countrywide approval. Come visit us at our booth and learn more about our unique combination of services.

### PRODUCTS & SERVICES

- Competitive Intelligence
- Product Development (Policy Forms, Rating Plans and Rules)
- Program Support
- Compliance & Regulatory
- State Filing Services
- Actuarial Consulting

\*RECOGNIZED AS A LEADER IN MARKET INTELLIGENCE



### MYSTIC CAPITAL ADVISORS GROUP, LLC

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### OVERVIEW OF COMPANY

Mystic Capital provides a broad range of financial consulting services to the insurance and financial services industries. Founded in October 2001 by three former employees of Hartford Financial Services Group, Inc., the group has more than 60 years of experience in Mergers & Acquisitions. Our clients include: program administrators, insurance brokers, MGAs, MGUs, wholesalers, banks, insurance companies, private equity firms, reinsurers, reinsurance brokers, and third party administrators (TPAs). Mystic Capital has completed over 150 insurance industry transactions worth over \$1.8 billion in aggregate deal value since the inception of the firm. Mystic Capital also recently opened a London office to support our international clients.

### PRODUCTS & SERVICES

- Mergers & Acquisitions Advisory (Buyer and Seller)
- Perpetuation & Succession Planning
- Owner and Producer Compensation Plans
- Lender Advisory Services
- Due Diligence
- Business Valuations
- Capital Raising



**OVERLAND SOLUTIONS, INC.**

10975 Grandview Dr., Suite 400  
Overland Park, KS 66210  
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**COMPANY CONTACTS**

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**Julie Brackett** P 800-352-4767 x3023  
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**OVERVIEW OF COMPANY**

Overland Solutions is a nationwide provider of premium audit and loss control services. OSI is headquartered in Overland Park, Kansas with regional offices throughout the country. With more than 85 years of proven experience no other company provides this level of service or can quickly adjust to fluctuations in work volume and staffing needs.

**PRODUCTS & SERVICES**

Overland Solutions leads the industry specializing in premium audit services, loss control consulting, commercial inspection surveys and high value residential underwriting surveys. Each of our specialty areas provides the right level of secure reporting and detail for companies. From cost-conscious to cutting-edge technology and training, OSI has an array of solutions that can minimize risk and maximize underwriting results.



**TYSERS**

**TYSERS**

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**OVERVIEW OF COMPANY**

Tysers was formed in 1820 and is one of the oldest surviving Lloyd’s insurance brokers. Originally a family firm, it is now 100% employee owned. Headquartered in London with over 220 employees, Tysers currently places over \$700m of premium into the London and International Markets from a global client base. Tysers works closely with US based Program Administrators structuring programs suited to the London market and have been successful in setting up programs for a broad range of classes.

**PRODUCTS & SERVICES**

We strive to exceed expectations through the quality of service and technical advice. In order to achieve this we operate with: short lines of communication, integrated teams of brokers and claims specialists, no pressure from external shareholders to cut corners or impose false economies allowing us to provide a consistent service. Our products include: Property, General Liability, Professional Indemnity, Accident, Health and Contingency, Transportation, Specialist classes including: Jewellers Block, Fine Art, Product Recall, Terrorism and Bloodstock.

**VERTIBRANDS**

1301 Wright’s Lane East  
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 Ph: 877-988-3784 x280  
 www.vertibrands.com

**COMPANY CONTACT**

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 rlook@vertibrands.com

**OVERVIEW OF COMPANY**

Vertibrands is a full-service, insurance advertising and marketing firm that prides itself on strategic planning and client results. Our marketing strategists and creative specialists work hand-in-hand to provide our clients with innovative solutions to maximize their ROI. We keep up with the latest trends and our award-winning creative team has been the recipient of numerous TMPAA, IMCA and AAMGA awards for design, web sites and overall campaign effectiveness.

We work with Program Managers serving non-competing industries and are committed to client service excellence and sharing best practices for each.

**PRODUCTS & SERVICES**

- Branding—strategic planning, positioning and corporate identity
- Advertising—competitive review and creative development
- Media—media research, planning and placement
- Content Marketing—public relations, social media, scheduling and reporting
- Automated Marketing—inbound and “drip” marketing tools
- Direct Marketing—one-to-one communications, direct mail and e-mail
- Interactive—website development, webcasts, sponsorships and video development

**WILSON ELSER****WILSON ELSER**

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**OVERVIEW OF COMPANY**

With nearly 800 attorneys in 24 offices throughout the U.S., Wilson Elser serves clients of all sizes, across multiple industries and around the world. Since our founding in 1978, we have forged a reputation as a formidable player in insurance coverage and defense. Our experience in this tightly regulated, cost-conscious industry has shaped a culture of accomplished professionalism and efficiency. Today, we offer first-class legal services, spanning the spectrum of litigation as well as business and financial transactions.

**PRODUCTS & SERVICES**

We are recognized globally as a—if not the—leading law firm serving the insurance industry. We offer one of the industry’s most comprehensive program management practices with combined experience, depth and resources that cannot easily be matched. We also provide the services of accomplished attorneys skilled at addressing the complex legal issues that accompany business and financial transactions and maintain a substantial and well-regarded Government Relations practice.

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# TECHNOLOGY

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**OVERVIEW OF COMPANY**

Advisen generates, integrates, analyzes and communicates unbiased, real-time insights for the global community of commercial insurance professionals. As a single source solution, Advisen helps the industry to more productively drive mission-critical decisions about pricing, loss experience, underwriting, marketing, transacting or purchasing commercial insurance.



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9431 Island Point Road  
Sherrills Ford, NC 28673  
Ph: 828-478-7381  
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**OVERVIEW OF COMPANY**

Blue Goose specializes in providing Program Managers, MGA's, and Wholesalers the "Next Generation" of Underwriting Workflow and Insurance Accounting solutions. We know Insurance and we understand how to optimize your Insurance processes for maximum efficiency from end-to-end. Our system is a .Net / SQL Policy Administration System with integrated Rules Based Underwriting Workflow that uses our unique ACORD Form Data Capture feature. You purchase only the modules you need and we configure the system to meet your LOB and Carrier requirements.

**PRODUCTS & SERVICES**

- Rules Based Underwriting Workflow
- Policy Issuance with Data Capture
- Agent / Broker Portals
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- Insurance Billing and Accounting
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## CORELOGIC/RISKMETER ONLINE

125 Broad Street, 2nd Floor  
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### OVERVIEW OF COMPANY

CoreLogic (NYSE: CLGX) is a leading property information, analytics and services provider in the United States and Australia. The company's combined data from public, contributory, and proprietary sources includes over 3.3 billion records spanning more than 40 years, providing detailed coverage of property, mortgages and other encumbrances, consumer credit, tenancy, location, hazard risk and related performance information. The markets CoreLogic serves include real estate and mortgage finance, insurance, capital markets, transportation and government.

### PRODUCTS & SERVICES

RiskMeter Online is an on-demand insurance platform, delivering natural hazard risk data that empowers underwriters, agents and brokers to make quick and accurate property risk determinations. With over 30 natural hazard risk reports, RiskMeter Online goes beyond basic property risk mapping by providing comprehensive solutions with highly granular risk data to analyze your book of business—including capabilities to return hazard risk scores, catastrophe modeling (EQECAT), aggregate mapping and building characteristics.



## COUNTERPOINT SOFTWARE, INC.

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### OVERVIEW OF COMPANY

Counterpoint Software, Inc. has been providing state-of-the-art automation solutions for program administrators, MGAs, and carriers since 1997, and has been a TMPAA member since 2001. Counterpoint produces software products that complement and streamline the current workflows of our clients, with a focus on ease of implementation, user experience and cost efficiency. Counterpoint provides a solid foundation and a modular.

### PRODUCTS & SERVICES

- Real-time quoting and binding – achieved through state-of-the-art rating automation
- Policy administration – instantly issue and track policy documents and forms based on your rating
- Document management— all documents per risk at your fingertips including upload capability
- Premium accounting – supports direct and agency billing with aging reports and carrier bordereaux
- Claims tracking – handles direct, TPA and carrier claims tracking with loss run and ratio reports
- Diary and reporting – assign and track tasks and take control with powerful management reporting



## DRAGONFLYWARE

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### OVERVIEW OF COMPANY

Dragonflyware® is an insurance software and services provider to the Property & Casualty market located in Austin, TX. Dragonflyware has extensive knowledge of the surplus insurance marketplace having dealt with a wide range of products including property, general liability and other specialty programs. We also have experience with state-admitted lines of business, primarily homeowner's insurance and other dwelling products. We regularly manage data reporting to carriers via Bordereaux or customized layouts in order to keep your product analysis and risk management healthy.

### PRODUCTS & SERVICES

The simplest, most powerful way for MGAs, Program Managers and Carriers to manage P&C insurance products-PolicyWire empowers you to easily and efficiently manage product lines in an affordable and revolutionary way. PolicyWire is a complete policy administration system providing you with accounting capabilities, policy issuance, reporting, business management, claims, workflow management, task management, document management and more. Both your underwriter and retail agent will use PolicyWire. Having one solution simplifies and streamlines your business increasing your productivity and efficiency.



## EPIC-PREMIER INSURANCE SOLUTIONS, INC.

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### OVERVIEW OF COMPANY

Since 1996, Epic-Premier has delivered intelligent automation tools and services to the insurance industry. Our clients are entrepreneurial by nature, so their business requirements change quickly. This means their automation systems have to be agile. Our unique approach sets us apart; software is only part of the equation, having an insurance knowledgeable and capable service team balances it out. We enable our clients to work more efficiently, produce higher ROI, and provide better customer service.

### PRODUCTS & SERVICES

Epic-Premier offers the **ConceptOne™** suite of products, including a Software Development Kit (SDK), providing single-entry, fully integrated Policy, Accounting, Claims, Correspondence, and Document management solution for the insurance industry. Our products have the flexibility to manage both up and down stream insurance business in the admitted and non-admitted E&S markets. The **ConceptOne** SDK product provides clients and third party vendors with the ability to develop custom web portal applications based on the **ConceptOne** product's transaction processing engine.



## **I-ENGINEERING, INC.**

4 Armstrong Road  
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## **COMPANY CONTACTS**

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### **OVERVIEW OF COMPANY**

I-Engineering develops and markets integrated insurance solutions to provide your office with a modern, user-friendly working environment. We have created and implemented a sophisticated collection of cutting edge insurance software solutions catering to Wholesale Brokers, MGAs, Program Administrators and Carriers. The features and functionality of our products complete the automation of business processes and user management that are customized to a client's business workflow.

### **PRODUCTS & SERVICES**

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## **INTEC**

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### **OVERVIEW OF COMPANY**

Instec, founded in 1982, is a leading provider of services and technology to the commercial property and casualty insurance industry. Instec is a partner in providing business expertise and creating profitable growth. As providers of full policy life cycle management, Instec works with its clients on successful Program Business as well as streamlining operations from first quote to last endorsement. Instec's flagship technology, Quicksolver, is a best-of-breed rating and policy administration solution supporting all major lines of business, in all 50 states, and with native bureau rates, rules forms and statistical content.

### **PRODUCTS & SERVICES**

Quicksolver, is a best-of-breed rating and policy administration solution supporting all major lines of business, in all 50 states, and with native bureau rates, rules forms and statistical content. As a Microsoft Gold Certified Partner, Instec delivers strategic solutions that enable clients to drive competitive advantages in rating, issuing, and reporting in order to lower costs and maximize profitability. With more than three decades of experience, Instec is a trusted partner with deep industry knowledge, innovation and insight.



**INSURE LEARN**  
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**OVERVIEW OF COMPANY**

Based in Phoenix, AZ Insure Learn has over 15 years experience developing engaging online training applications designed to reduce loss and grow your book of business. Insure Learn is the only company that works exclusively with Program Administrators, MGAs and Insurance Carriers to develop custom online training targeting program specific loss data and insured’s work environments.

**PRODUCTS & SERVICES**

Insure Learn utilizes a targeted approach to loss control through online safety training. Working with Program Administrators to isolate top areas of loss and create short bite-sized courses focused on high incident and severity claims. Training is customized to the insured’s work environment which is proven to be more effective in creating behavioral change. Targeted training tied together with an intuitive online learning portal provides 24/7 online access and distribution of training content along with management tracking and reporting.



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**OVERVIEW OF COMPANY**

Insurity, Inc. provides policy administration, claims, billing and analytics software to more than 100 carriers - large and small, national or regional, commercial, personal, or specialty lines writers as well as MGAs. Insurity offers configuration options for all aspects of the insurance processing lifecycle. Our offering is a balance between rich content, flexible, modular deployment, robust tooling, and an array of optional services from hosting to regulatory compliance.

**PRODUCTS & SERVICES**

Insurity’s solutions provides the opportunity for Program Administrators to quickly introduce new lines of business to the marketplace through a rich set of content and flexible tools and service options to manage the policy administration lifecycle. Our product suite includes solutions for policy administration, billing, and claims as well as a robust solution that consolidates data from core systems to provide insurance companies with integrated intelligence and actionable insights for agile decision making.



## NETRATE SYSTEMS

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### OVERVIEW OF COMPANY

NetRate Systems, Inc., located in Okemos, MI, opened in 1998, with a core of senior developers who all had a strong background in producing and supporting automated rating systems. Their expertise went into creating a robust, flexible, and powerful system for ISO-based Commercial Lines Rating focused on the program business marketplace. Our continuous system improvements have made our feature rich applications go-to solutions for TMPAA members in need of flexible, affordable and powerful ISO-based rating.

### PRODUCTS & SERVICES

Featured Products:

- NetRate ISO Commercial Lines Rating System: a highly configurable ISO-based rating engine that incorporates our fully maintained ISO rate and rule library for all the major ISO lines.
- NetSynergy: an a la carte offering of our web service applications that enables us or 3rd party vendors to provide customized web based solutions.
- NetPolicy Printing System: a rules based document generation system that automates the production of quote and policy documents.



## NXTECH INCORPORATED

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### OVERVIEW OF COMPANY

NxTech, Inc. is a leading P&C software and services provider that specializes in helping program administrators/GAs, retail agents and carriers exchange data electronically to conduct business. With NxTech's proven solutions and industry standards, program administrators and carriers have been able to eliminate keystrokes and:

- Get more quotes to market, faster, increasing quote volume by as much as 40%.
- Attract agency partners by making it easy to do business.
- Enable agents to better service and retain accounts with quick access to policy and claim information.

### PRODUCTS & SERVICES

Quote more, write more, with NxTech's Total Interface Solution™. With 30 years of industry leadership, we will help you leverage your system investments and streamline business workflows with your partners, with:

- Real time rating bridges between program administrator and carrier systems,
- Policy download to agent systems,
- Real time access to information,
- Agent portals.

Contact NxTech today to learn more about how we can help you grow your business.



**SPECIALIZED BUSINESS SOFTWARE, INC.**

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**OVERVIEW OF COMPANY**

Specialized Business Software, Inc. is a developer of custom insurance software systems located in Cleveland, Ohio. Founded in 1999 to create insurance software systems for the mortgage industry as part of our family-owned MGA, we are now the leading independent insurance software provider for the specialty insurance industry. The software we create is fully owned by our clients and we have developed multiple systems for many different programs at both the agency and carrier levels.

**PRODUCTS & SERVICES**

A typical SBS client has trouble fitting their insurance program into a packaged software system or they wish to use their technology as a proprietary advantage in the marketplace. We see many manual spreadsheet based programs and turn those into automated web systems with insured self-service built-in. Our extensive portfolio includes developing insurance systems for agencies and carriers that usually include: Policy Management, Rate-Quote-Bind, Business Process Automation, Insured Self-Service, and Document Management.



**VERTAFORE**

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**OVERVIEW OF COMPANY**

Vertafore delivers software and services that transform the business of insurance. Unique to the industry, more than 20,000 customers rely on Vertafore to provide integrated technology that connects the entire industry with the most complete source of solutions—agency management, rating and connectivity, content management and workflow, information solutions and producer lifecycle management—so their businesses run better and are more profitable

**PRODUCTS & SERVICES**

Vertafore Agency Platform, Producer Lifecycle Management, ImageRight, AIM, WorkSmart, BenefitPoint, AMS360, WorkSmart, Pipeline Manager, Vertafore Producer Advantage

**VIRTUAL MGA**

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**OVERVIEW OF COMPANY**

Virtual MGA specializes in facilitating the distribution of insurance products between program administrators and their retail trading partners. Virtual MGA has created a web-based trading platform for program administrators and MGA's to distribute their insurance products over the Internet so they can interact more efficiently with their retail trading partners. Virtual MGA, based in Austin, Texas, has a management team with deep roots in both the insurance industry and insurance software industry for both carriers and brokers.

**PRODUCTS & SERVICES**

Virtual MGA has created a web-based trading platform for program administrators and MGA's to distribute their insurance products over the Internet so they can interact more efficiently with their retail trading partners. The transaction platform can provide all the functionality required to complete an insurance placement: rate, quote, proposal, request to bind, bind, policy issuance, endorsement processing, certificate management, bordereaux production and in some cases surplus lines filings. Over 40 different types of P&C products have been implemented on the platform.

**VRC INSURANCE SYSTEMS**

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**OVERVIEW OF COMPANY**

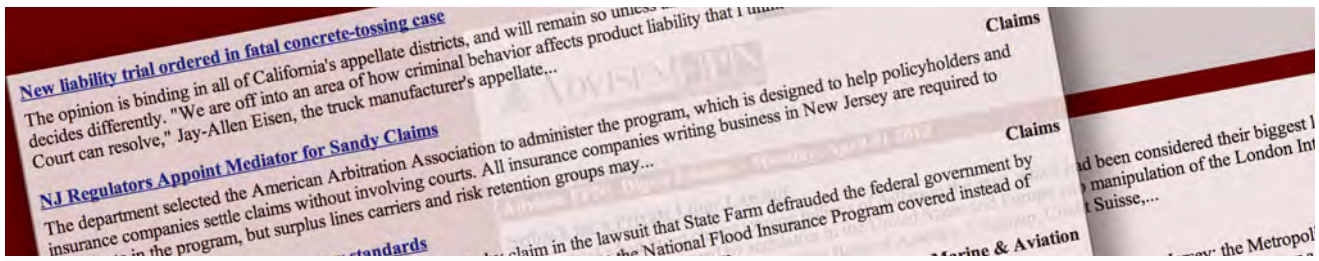
Virtual Research Corporation was established in 1986 as a software research and development organization. The cornerstone of VRC's longevity is the flexibility, reliability and scalability of its product offerings. Our customers can comfortably know that their business process capabilities and cost management goals can and will be advanced from year to year with user group recommendations, industry-leading client direction, and creative management ideas. See why five of the top ten international brokers rely on Velocity to handle their program business. Stop by our booth at TMPAA today.

**PRODUCTS & SERVICES**

Products and services provided by VRC start with the Velocity Standard and have fully integrated components that include:

Information management, rate, quote, policy issuance, claims administration, fiduciary accounting, document and image management, AL3 carrier interfaces, graphics dashboard, reporting, web portal, application programming interfaces, scripting engine and web flows.

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