

Where Program Business Gets Done

Field of Dreams

2013 TMPAA Mid Year Meeting

May 6th–8th • Hilton Baltimore at Camden Yards • Baltimore, Maryland



TARGET  **MARKETS**
Program Administrators Association

VENDOR SERVICES



Financing *exclusively* for insurance professionals

TAKING YOU WHERE BANKS WON'T

TAKE A PROVEN ROAD
TO BUSINESS GROWTH.

With nearly \$300 million in loan originations exclusively to the insurance industry, 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.



1-866-OAK FUND | oakstreetfunding.com/Journey

See recent transactions or contact an experienced team member:

Todd Gray	317-428-5153	todd.gray@oakstreetfunding.com
Kelly Drouillard	913-980-7773	kellyd@oakstreetfunding.com
Joe Castaldi	484-268-6699	joseph.castaldi@oakstreetfunding.com
Chris McAtee	317-428-3829	chris.mcatee@oakstreetfunding.com
Adam Pleva	317-428-3826	adam.pleva@oakstreetfunding.com

OAK STREET FUNDING 

Loans and lines of credit subject to approval. California residents: Loans made pursuant to a Department of Corporations California Finance Lenders License. Potential borrowers are responsible for their own due diligence on acquisitions.

TABLE OF CONTENTS

ACTUARIAL SERVICES	2	Overland Solutions, Inc.	29
Milliman, Inc.	3	ReSource Pro	29
Perr & Knight	3	Supportive Insurance Services, LLC	30
CLAIMS MANAGEMENT	5	PROGRAM BUSINESS SERVICES	32
Carl Warren & Company.	6	Altamont Capital Partners	33
CBCS, Inc.	6	Axiom Development	33
Engle Martin & Associates, Inc.	7	Bill It Now	34
Gallagher Bassett	7	Input 1, LLC	34
The Kingstree Group	8	International Insurance Consultants.	35
North American Risk Services, Inc.	8	Island Financial Insurance Associates, Inc.	35
Paradigm Management Services	9	Martin & Company	36
Sedgwick.	9	Tysers.	36
TRISTAR Risk Management	10	Vertibrands, Inc.	37
VeriClaim, Inc.	10	Wilson Elser	37
Western Litigation, Inc.	11	TECHNOLOGY	38
York Programs	11	Blue Goose Technology Solutions.	39
FINANCIAL SERVICES	16	CoreLogic/RiskMeter Online	39
Cost Financial Group, Inc.	17	Counterpoint Software Inc.	40
Dowling Hales.	17	Epic-Premier Insurance Solutions, Inc.	40
FIRST Insurance Funding	18	I-Engineering, Inc.	41
Griffin Financial Group, LLC.	18	Instec	41
Imperial PFS	19	Insure Learn.	42
Lloyd's Amercia	19	NetRate Systems, Inc.	42
Mystic Capital	20	NxTech, Inc.	43
Oak Street Funding	20	QualCorp, Inc.	43
Sterne Agee	21	Specialized Business Software	44
SALUTE TO OUR SPONSORS	24	Virtual MGA Ltd. Co.	44
OUTSOURCING	26	VRC Insurance Systems	45
CSC	27	TMPAA Vendor Partner List	
ePlace Solutions	27	<i>with Trade Show Exhibitors indicated</i>	47
Insurance Recruiting Specialists	28	<i>Inside front cover:</i>	
MIS Insurance Services.	28	Oak Street Funding Advertisement	
		<i>Inside back cover:</i>	
		ReSource Pro Advertisement	
		<i>Outside back cover:</i>	
		Vertibrands Advertisement	

ACTUARIAL SERVICES

**MILLIMAN, INC.**

11301 Fifth Avenue, Suite 3800
Seattle, WA 98101

Ph: 206-624-7940
www.milliman.com

COMPANY CONTACTS

Mike Blivess P 610-975-8020
mike.blivess@milliman.com

Paul Struzziere P 516-535-6403
paul.struzziere@milliman.com

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 benefits 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.

PRODUCTS & SERVICES

Milliman's analysis of your program's loss experience 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, projections of loss reserves 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, predictive modeling, enterprise risk management, claim reviews, business planning, economic analysis, insurance company ratings and claim and underwriting operational reviews.

**PERR&KNIGHT**

3 Second St., Ste 802
Harborside Financial Center, Plaza 10
Jersey City, NJ 07311

Ph: 201-963-1550
PerrKnight.com

COMPANY CONTACTS

Dean Ferdico P 201-963-1550 x2101
dferdico@perrknight.com

Kristy Greco P 352-222-0083
kgreco@perrknight.com

OVERVIEW OF COMPANY

Perr&Knight is 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 insurance support services include Actuarial Consulting, Competitive Intelligence, Data Services, Insurance Technology, Regulatory Compliance and Risk Services, including Captive Management. We provide these services to insurance carriers, program administrators, managing general agents, brokers, self-insureds, public entities, and other intermediaries located throughout the United States and abroad.

PRODUCTS & SERVICES

Perr&Knight is focused on speed-to-market initiatives for our clients. With over 35 actuaries and regulatory compliance consultants who specialize in pricing insurance products, developing forms, and licensing products, we help companies develop profitable products faster. We created RateFilings.com, the largest database of competitor filings nationwide with search capabilities to find the competitive information companies need. In addition, our state filings group is the largest provider of rate, rule and form filing services in the country, preparing and submitting thousands of filings annually for all lines of business.

Sometimes you need help reaching top speed.

Speed-to-market initiatives are critical for any insurer seeking to expand existing products or enter new markets. Perr&Knight's integrated suite of insurance consulting services includes

competitive intelligence, product design, actuarial support and regulatory compliance - everything our clients need to reach top speed and develop timely, profitable products.

Contact us to learn more:

Phone: 352.222.0083

E-mail: sales@perrknight.com

Web: PerrKnight.com



CLAIMS MANAGEMENT



CARL WARREN & COMPANY

770 South Placentia Avenue
Placentia, CA 92870
Ph: 800-572-6900
www.carlwarren.com

COMPANY CONTACTS

Richard McAbee P 888-858-2807x101
rmcabee@carlwarren.com
Larry Finn P 657-622-4243
lfinn@carlwarren.com

OVERVIEW OF COMPANY

Carl Warren & Company is an employee-owned Third Party Claims Administration firm with 36 locations strategically placed nationwide. Our focus is on the fair, efficient, and responsive resolution/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 awarded California/Western States ESOP Chapter 2012-2013 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.

800 Main Street, PO Box 248
Dubuque, IA 52004-0028

COMPANY CONTACTS

Dave Franson P 563-587-5276
dfranson@cbcsclaims.com
Brian Wright P 847-969-1298
bwright@cbcsclaims.com

VERVIEW OF COMPANY

CBCS was established as a TPA in 1983 and has been handling P&C claims for 30 years. We provide superior claims services for large deductible, self-insured retention and captive clients. Our unique service model operates as a dedicated, centralized team for our programs. CBCS investigates, evaluates, negotiates, manages and resolves every claim as if it were our own...focused to reduce our clients total cost of loss.

PRODUCTS & SERVICES

- Third Party Administration of Property & Casualty Claims
- Medical Cost Containment
- Extensive RMIS Portal for Claims Management Clients
- Accident Triage Services
- Subrogation Services
- Safety Management Services



ENGLE MARTIN & ASSOCIATES, INC.

5180 Roswell Road, Suite N100
Atlanta, Georgia 30342
Ph: 800-818-5619
www.englemartin.com

COMPANY CONTACTS

Todd Evans P 678-553-4400
tevens@englemartin.com

Bob Gambell P 610-205-5000
bgambell@englemartin.com

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 TPA/claims management 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.

The Gallagher Centre, Two Pierce Place
Itasa, IL 60143
Ph: 630-773-3800
www.gallagherbassett.com

COMPANY CONTACTS

Mike Bell P 630-285-3431
michael_bell@gbtpa.com

Derek D'Onofrio P 973-644-5940
derek_d'onofrio@gbtpa.com

OVERVIEW OF COMPANY

Gallagher Bassett (GB)—one of the largest third-party administrators in the industry—has been providing risk management services for 50 years. Our revenues exceed \$571M. We have over 100 offices worldwide, staffed with over 4,300 specialists who serve nearly 3,900 customers. GB offers Workers Compensation, Automobile, General and Products Liability, Texas Non-Subscriber, and Property coverage. Each client's program is designed with highly tailored solutions for managing claim outcomes.

PRODUCTS & SERVICES

- Claims Management
- Information Management
- Medical Cost Containment (Managed Care)
- Consultative Services (Risk Control Consulting and Appraisals)



KINGSTREE GROUP

900 West Valley Road, Suite 300
Wayne, PA 19085
Ph: 610-254-9050
www.kingstree.net

COMPANY CONTACTS

Anne Rivers P 610-291-0600
Arivers@kingstree.net

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.

240 E. Central Parkway, Suite 4010
Altamonte Springs, FL 32701
www.narisk.com

COMPANY CONTACTS

Jamie Bernardo P 321-441-1336
jbernardo@narisk.com
Robert Ruryk P 321-441-1248
rruryk@narisk.com

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 staff is among the industry’s most experienced, and our technology is unsurpassed. Through our people, technology, workflows, and protocols, we are committed to providing the best claims administration and management available.

PRODUCTS & SERVICES

NARS maintains the philosophy that our people are our most valuable resource. NARS has been successful in attracting some of the industry’s most experienced and qualified claims personnel while enjoying an exceptionally low employee turnover level. 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 and Property. Additional expertise and support is provided to our claims staff by their Dedicated Recovery Unit for the handling of subrogation, salvage and deductible collection, and SIU specialists that focus on the threat of claims fraud.

PARADIGM OUTCOMES

1277 Treat Boulevard, Suite 800
Walnut Creek, CA 94597

Ph: 800-676-6777

www.paradigmcorp.com

COMPANY CONTACTS

Peter Hunter P 973-998-4906
peter.hunter@paradigmcorp.com

Kevin Turner P 925-677-4835
kevin.turner@paradigmcorp.com

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.



sedgwick[®]

SEDGWICK

1100 Ridgeway Loop, Suite 200
Memphis TN 38120

Ph: 901-415-7400

www.sedgwick.com

COMPANY CONTACTS

Paul Ross P 847-413-9675
paul.ross@sedgwick.com

Marcia Giesler P 614-376-5813
marcia.giesler@sedgwick.com

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

100 Oceangate, Suite 700
Long Beach, CA 90802
Ph: 562-495-6600
www.tristarrisk.com

COMPANY CONTACTS

Michael Ebert P 609-548-1396
michael.ebert@tristargroup.net
Frank Filippelli P 610-613-0543
frank.filippelli@tristargroup.net

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.

1833 Centre Point Circle, Suite 139
Naperville, IL 60563
Ph: 800-621-7059
www.vericclaiminc.com

COMPANY CONTACTS

Kevin Thar P 630-245-7020
kthar@vericclaiminc.com
Janel Giarratano P 610-858-6225
jgiarratano@vericclaiminc.com

OVERVIEW OF COMPANY

vrs vericlam 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 vericlam 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 vericlam 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.

8401 N. Central Expressway
Dallas, TX 75225
Ph: 214-265-4921
www.professionalclaimsmanagers.com

COMPANY CONTACTS

J. Brian Hobbs P 214-265-4921
brian_hobbs@westernlitigation.com

OVERVIEW OF COMPANY

Professional Claims Managers (“PCM”) provides comprehensive claims, litigation management and program development services throughout North America. PCM 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

PCM 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 RISK SERVICES GROUP

99 Cherry Hill Road, Ste 102
Parsippany, NJ 07054
Ph: 877-927-2255
www.yorkrsg.com

COMPANY CONTACTS

Mark Kissick P 781-917-1767
mark.kissick@yorkrsg.com
Lisa Arguello P 973-404-1215
lisa.arguello@yorkrsg.com

OVERVIEW OF COMPANY

York Risk Services Group, Inc., headquartered in Parsippany, NJ, is an insurance services business focused on the property and casualty industry. York is a TPA and independent adjusting firm providing valuable claims and risk management services to insurance carriers, program administrators, managing general agents, brokers, self-insureds, public entities, and other intermediaries located throughout the United States. York enjoys a loyal and growing client base and effectively manages more than \$1 billion in reserves.

PRODUCTS & SERVICES

York Programs, a division of York RSG, utilizes experienced claims adjusters, skilled in handling first dollar claims, as well as its proprietary claims system, **Claims Connect™**, to aid in protecting the profitability of more than 200+ industry-specific niche programs. With **Claims Connect**, the claims-handling quality, communications and evaluation of claims data have proven invaluable to a variety of insurer, program administrator and managing general agency clients. We not only provide claim services but important ancillary insurance services including managed care, loss control, policy issuance and pool administration, subrogation, catastrophe response and independent field adjusting.

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 or Larry Finn at (657) 622-4200, lfinn@carlwarren.com.



CARL WARREN & COMPANY

Claims Management and Solutions

PROVIDING QUALITY SERVICE SINCE 1944

KINGSTREE GROUP

The Experts in Workers Compensation Managed Care
That Can Help You:

- Report and Intervene on Day One of an Injury with MyCare24 Nurse Hotline
- Optimize Injured Worker Care
- Reduce Medical and Indemnity Costs, Claim Handling Fees and Litigation Expenses - ROI Average is 200%
- Analyze Claims Data - Provide Reports, Recommendations and Implementation
- Protect the Profitability of Your Program

900 West Valley Road, Suite 300
Wayne, PA 19087

888.853.6412

www.kingstree.net



Anne Rivers

Senior VP Marketing/Business Development

mobile: 610-291-0600 • arivers@kingstree.net



Let us throw you a line.

Most workers' compensation executives believe medical costs to be one of the industry's most critical issues, but few believe anything meaningful can be done about it.

Fortunately there's Paradigm Outcomes. Our catastrophic case management delivers:

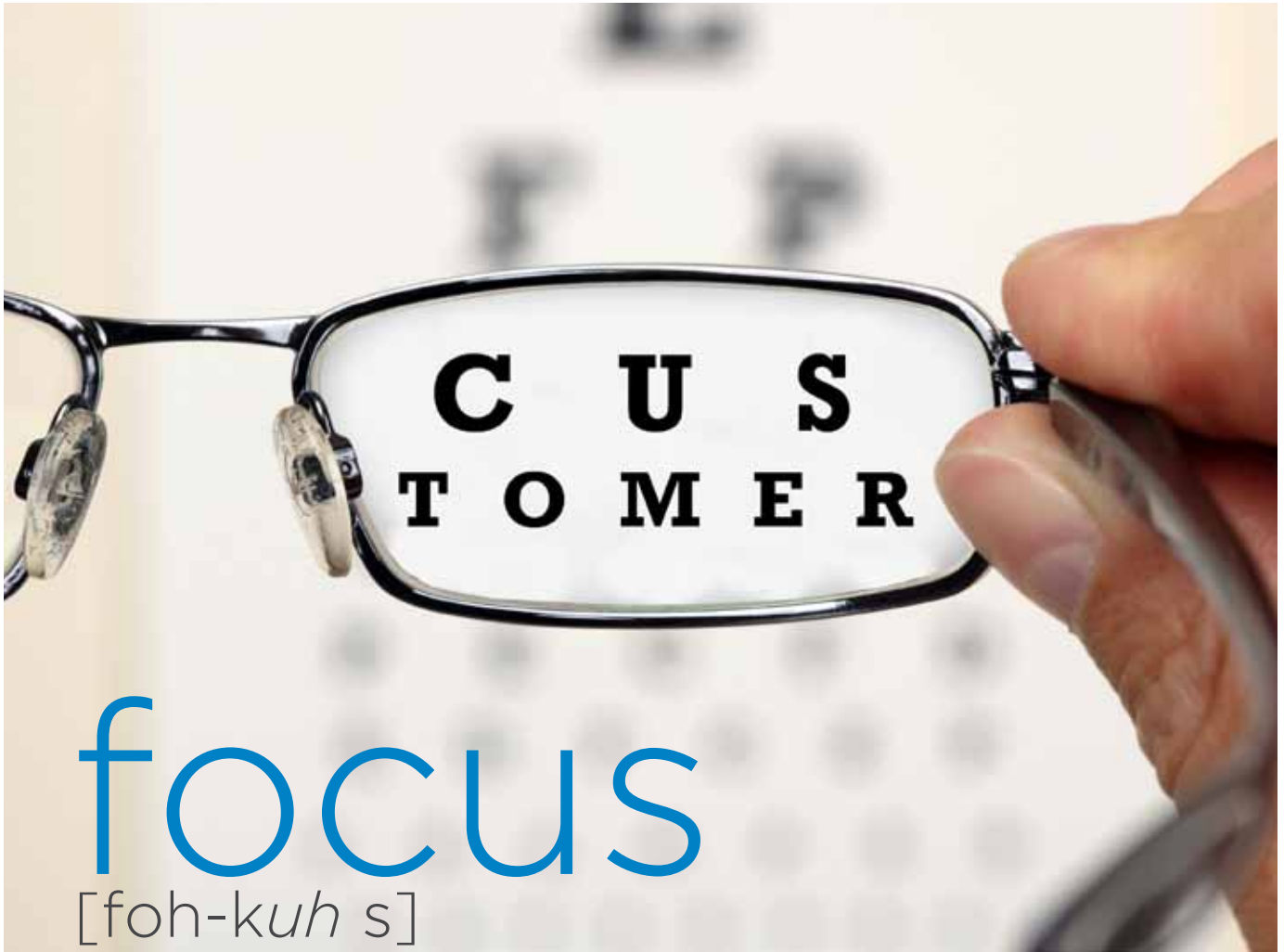
- 5x better outcomes¹
- 36% lower costs¹
- 29% lower lifetime medical reserves
- Guaranteed outcomes

Results that keep you floating.

PARADIGM®
OUTCOMES

800.676.6777
www.paradigmcorp.com

1. Based on an independent comparison by Milliman, Inc., the nation's leading actuarial and consulting firm, to their proprietary database of similar workers' compensation claims.



To be clearly and sharply defined.

Focused on meeting your needs.

At York Programs, our focus on specialization allows us to build a detailed understanding of Programs and the customers we serve. Our Programs expertise ensures that our clients' specific needs are fulfilled from every angle through a personalized level of service that produces significant and positive claims results.

- | **Dedicated** units of highly qualified and experienced Program adjusters who specialize in only your claims
- | **Customized** claims services tailored to your program's culture, communication preferences, and preferred level of claims handling aggressiveness
- | **Focused** solutions that meet the needs of your program's Administrator, MGA, Broker and Carrier



To gain a better perspective on what York can do for your program, please contact Program Development Specialist, Lisa Arguello, at (973) 404-1215 or visit our website at www.yorkrsg.com.

FINANCIAL SERVICES



COST FINANCIAL GROUP, INC.

784 Wall Street, Suite 110
O'Fallon, IL 62269
Ph: 800-844-2678
www.costfinancial.com

COMPANY CONTACTS

David E. Gebhardt P 618-206-3220
daveg@costfinancial.com
Jay Pursell P 618-206-3220
jayp@costfinancial.com

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, LLC

250 Park Avenue, Suite 2050
New York, NY, 10177
Ph: 212-592-5700
www.dowlinghales.com

COMPANY CONTACTS

John Kraska P 212-592-5709
jkraska@dowlinghales.com
Bob Seda P 206-236-6153
bseda@dowlinghales.com

OVERVIEW OF COMPANY

Dowling Hales, LLC, together with Dowling Hales Securities, LLC, is an investment bank and broker-dealer focused on the insurance sector. Since the firm's founding in 1972, our professionals have worked exclusively with key stakeholders throughout the insurance sector. Our professionals have sold their own insurance agencies, acquired others and invested in a wide variety of companies in the insurance industry. We understand our clients' needs because we have been in our clients' position. Our professionals average over 20 years of experience and, combined, have completed hundreds of mergers and acquisitions for insurance companies.

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.

FIRST INSURANCE FUNDING

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

COMPANY CONTACTS

Scot Feuerzeig P 847-572-4602
scot.feuerzeig@firstinsurancefunding.com
Jim Miller P 847-572-4650
jim.miller@firstinsurancefunding.com

OVERVIEW OF COMPANY

FIRST Insurance Funding has been offering industry-leading premium finance services for over twenty years. In addition to offering traditional premium finance services, FIRST also offers billing and collection services through our FIRSTDirect program and Life Insurance financing through FIRST Life Funding. Together with our parent company, Wintrust Financial, we also offer a full suite of financial solutions to our partners.

PRODUCTS & SERVICES

- Premium Finance Services including e-signature and paperless contract submission
- FIRSTDirect Customized Billing & Collection Services
- Life Insurance Funding
- Agency Development Consultative Training Program
- Treasury & Wealth Management



GRIFFIN FINANCIAL
GROUP LLC

GRIFFIN FINANCIAL GROUP, LLC

620 Freedom Business Center, Ste 210
King of Prussia, PA 19406
Ph: 610-205-6100
www.go2griffin.com

COMPANY CONTACTS

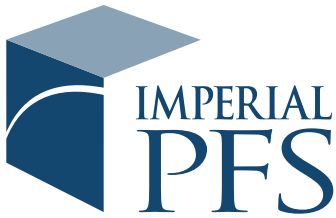
Jeff Waldron P 610-205-6028
jpw@go2griffin.com
Kevin Leigh P 610-205-6113
kml@go2griffin.com

OVERVIEW OF COMPANY

Griffin Financial Group is an investment banking firm serving the insurance industry. We provide a broad range of strategic, financial and transactional services to insurance companies and others in the sector, including retail producers, MGAs, MGUs (program administrators) and TPAs. We are particularly skilled in assisting our insurance industry clients capitalize on the many strategic growth opportunities available within the insurance segment. Griffin has a national reach and can serve companies wherever they may be located. Visit our website at www.go2griffin.com.

PRODUCTS & SERVICES

Griffin provides a wide range of investment banking services to the insurance industry, including mergers and acquisitions; capital planning; risk management; growth strategies; and alternative market structures, including captives and RRGs.



IMPERIAL PFS

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

COMPANY CONTACTS

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

The logo for Lloyd's features the word "LLOYD'S" in a white serif font, centered on a solid black rectangular background.

LLOYD'S AMERICA, INC.

25 West 53rd Street
New York, NY 10019
Ph: 212-382-4090
www.lloyds.com/america

COMPANY CONTACTS

Hank Watkins P 212-382-4090
hank.watkins@lloyds.com
Rodney Smith P 678-775-6832
rodney.smith@lloyds.com

OVERVIEW OF COMPANY

Lloyd's began 325 years ago, in Edward Lloyd's coffee house in the City of London, as the place where shipowners met those with the capital to insure their ships and cargo. Lloyd's has been protecting business and trade ever since, becoming the world's leading market for specialist property and casualty (re) insurance. The Lloyd's market consists of 87 syndicates managed by 57 managing agents. The sheer scale of the market offers huge diversity of products. In the US Lloyd's is the largest surplus lines insurer and third largest reinsurer.

PRODUCTS & SERVICES

Lloyd's America's primary role is to educate and promote the Lloyd's market to its US stakeholders, including our distribution partners, cedants, capital providers and regulators.

Lloyd's America does not underwrite or pay claims on behalf of the syndicates but is available to answer the questions of TMPAA members related to accessing Lloyd's for the placement of risk and servicing of policyholders in the US and Canada.



MYSTIC CAPITAL ADVISORS GROUP, LLC

165 Madison Avenue, Suite 402
New York, NY 10016
Ph: 212-251-0251
www.mysticcapital.com

COMPANY CONTACTS

Kevin Donoghue P 212-251-0972
kpd@mysticcapital.com
Mathew Klossner P 212-251-0251
mklossner@mysticcapital.com

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



OAK STREET FUNDING

11350 North Meridian Street, Ste 600
Carmel, IN 46032
Ph: 866-625-3863
www.oakstreetfunding.com

COMPANY CONTACTS

Carissa Newton P 317-428-3834
carissa.newton@oakstreetfunding.com
Kelly Drouillard P 913-980-7773
kellyd@oakstreetfunding.com

OVERVIEW OF COMPANY

Indianapolis-based Oak Street Funding (www.oakstreetfunding.com) is a family of diversified financial services companies that offers commission-based commercial financing exclusively for the insurance industry and third-party loan servicing for financial institutions. Oak Street utilizes industry knowledge, proprietary technology and passion to deliver top-quality service and capital products to insurance and finance professionals nationwide.

PRODUCTS & SERVICES

- Loans & Lines of Credit
- Working Capital
- Acquisition Funding

**STERNE AGEE & LEACH, INC.**

277 Park Avenue, 24th Floor
New York, NY 10172
Ph: 347-957 2772

COMPANY CONTACTS

Bill Yankus P 347-957-2772
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.



LLOYD'S

THE WORLD'S SPECIALIST INSURANCE MARKET

With 325 years of experience, Lloyd's provides innovative insurance solutions to individuals, businesses and organizations in more than 200 countries and territories worldwide.

We bring together an outstanding concentration of underwriting expertise and talent, backed by excellent financial ratings which cover the whole market.

US OFFICES

- Atlanta
- Boston
- Chicago
- Frankfort, KY
- Los Angeles
- New York
- US Virgin Islands

Contact your local Lloyd's America office for information and assistance.



www.lloyds.com/america

*Finding a
bakery program is ...*



www.TargetPrograms.com

- Hundreds of Program Markets
- Assistance Placing Big Risks
- Valuable Services for your Agency
- No Membership Fees



250 Philadelphia Pike • Wilmington, DE 19809 • 1-877-347-5700

2013 Mid Year Vendor Book Sponsors



Breckenridge
INSURANCE GROUP



Gallagher Bassett Services, Inc.

LEXINGTON INSURANCE

Munich RE  SM

OAK STREET
FUNDING  [®]



QBE



TYASERS

 **VERTIBRANDS**[®]

 **WILSON ELSE**R
WILSON ELSE R MOSKOWITZ EDELMAN & DICKER LLP


YORK[™]
Programs


ZURICH[®]

*Helping TMPAA Members Get
Program Business Done*

OUTSOURCING



CSC

10301 Wilson Boulevard
Blythewood, SC 29016-9018
Ph: 703-876-1000
www.csc.com/WCaaS

COMPANY CONTACTS

Stephen Mitchell P 803-960-6685
smitchell7@csc.com
Morgan Kinnett P 504-388-6767
mkinnett@csc.com

OVERVIEW OF COMPANY

A global leader in providing technology enabled business solutions and services, CSC's Insurance offerings help clients move into new markets fast, extend services to agents and policyholders, and control costs. CSC Insurance solutions and services cover the entire insurance value chain, from the front to the back office in all lines of business, with deep, proven functionality.

PRODUCTS & SERVICES

CSC's Policy, Billing, and Claims technology and services enables Program Business growth for P&C Carriers and large MGAs. Modern, JAVA-based solutions from CSC have successfully delivered assumption of 50-state workers comp programs in 45 business days; introduced new CPP programs in under 12 months; and rolled over 80,000 property policies in 90 days. Learn how you can capitalize on newly identified demand by quickly launching and promoting niche lines of business, resolving concerns about expansion costs and overcoming IT resource constraints.



ePLACE SOLUTIONS, INC.

410 W. Fallbrook Ave., Suite 105
Fresno, CA 93711
Ph: 800-387-4468
ePlaceSolutions.com

COMPANY CONTACTS

Randall Krause P 559-261-9295
rjkrause@ePlaceInc.com
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

15685 N Cave Creek Rd. Ste 200
Phoenix, AZ 85032

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

COMPANY CONTACTS

Brad Dunlap P 888-267-2483
Brad@TheBestIRS.com

Tom Bielicki P 866-556-0169
Tom@TheBestIRS.com

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

158 Lookout Place, Suite 201
Maitland, FL 32751

www.misinservices.com

COMPANY CONTACTS

Kris George P 866-694-2084 x300
kgeorge@misinservices.com

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.

**OVERLAND SOLUTIONS, INC.**

10975 Grandview Dr., Suite 400
Overland Park, KS 66210
Ph: 888-827-2118
www.olsi.net

COMPANY CONTACTS

Jason Baie P 800-395-1570 x3177
Jason.Baie@olsi.net
Julie Brackett P 800-352-4767 x3023
Julie.Brackett@olsi.net

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.

**RESOURCE PRO**

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

COMPANY CONTACTS

K. Patrick Armstrong P 212-297-9271
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.

**SUPPORTIVE INSURANCE
SERVICES**

2735 Washington Avenue
Vincennes, IN 47591
www.SupportiveIS.com

COMPANY CONTACTS

Jeff Brinkmann P 317-257-5734
jabrinkmann@supportiveis.com

Barb Donnar
badonnar@supportiveis.com

OVERVIEW OF COMPANY

We work with agents, agencies, adjusters, surplus lines brokers and insurance companies to obtain and maintain licenses across the country. Our staff averages 20 years of insurance experience. We minimize the time and effort needed to fulfill your licensing needs.

Customer service is our top priority. When you call, you speak directly with one of our experienced representatives. Our service orientation assures your licensing is complete and up to date.

PRODUCTS & SERVICES

For new licensing, we prepare your licensing paperwork, obtain all necessary certifications, file corporate registrations, coordinate registered agent services and follow-up to ensure time approval of your licensing with respective states.

Our maintenance services provide on-line, password protected access to your licensing information, notification of upcoming license renewals, process license renewals on your behalf, track continuing education, request duplicate licenses, change addresses and much, much more.

GO “LIVE” IN FORTY-FIVE



CSC

Speed up your program business with CSC's proven business process services:

- Launch a 50-state workers' comp program in 45 business days.
- Introduce a new CPP program in less than 12 months.
- Assume 80,000 property policies in 90 days.

Watch your business results improve with CSC.

[CSC.COM/PCBPO](https://www.csc.com/PCBPO)

PROGRAM BUSINESS SERVICES



ALTAMONT CAPITAL PARTNERS

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

COMPANY CONTACTS

Jonathan Altman P 650-264-7744
jaltman@altamontcapital.com
Keoni Schwartz P 650-264-7739
kshwartz@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 CONTACTS

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 CONTACTS

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

Chris Farfaras P 818-340-0030 x2135
 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
Deerfield Beach, FL 33441
Ph: 954-421-0122
www.iicuri.com

COMPANY CONTACTS

Ray Crowley P 954-421-0122
rc@iicuri.com
Glenn Wootton P 954-421-0122
gw@iicuri.com

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.

424 29th St. NE. Suite E
Puyallup, WA 98372
Ph: 253-770-0283
www.ifia-inc.com

COMPANY CONTACTS

Gary Galeotti P 253-770-0283
ggaleotti@ifia-inc.com
Ms. Chris Cuffe P 253-770-0283
ccuffe@ifia-inc.com

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

P.O. Box 70
Edgemont, PA 19028
Ph: 610-325-4455
www.martincompanyus.com

COMPANY CONTACTS

Sonja Rodebaugh P 815-284-6333
srodebaugh@martincompanyus.com
Brian Thomas P 610-325-4455
bthomas@martincompanyus.com

OVERVIEW OF COMPANY

Founded in 1993, Martin & Company started as a publisher of insurance rate, rule and form filing information and has since expanded to offer the six core business functions listed below. The M&C Team is comprised of skilled Insurance Professionals with over 175 years of combined experience. With a proven record of success and focus on our clients, M&C is the right choice for your insurance needs. Our interdisciplinary approach to State Filings and Compliance provides our clients with the assurance that we are taking every measure to achieve positive results that get your product or program to market faster.

PRODUCTS & SERVICES

- State Filing Services
- Competitive Filings
- Compliance & Regulatory
- Program Development
- Actuarial Support
- Insurance Publications



TYSERS

TYSERS

Beaufort House
15 St. Botolph St.
London EC3A 7EE
www.tysers.com

COMPANY CONTACTS

Richard Hodge P +44(0)-203-037-8253
richard.hodge@tysers.com
David Soper P +44(0)-203-037-8249
david.soper@tysers.com

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
West Chester, PA 19380
Ph: 877-988-3784 x280
www.vertibrands.com

COMPANY CONTACTS

Richard Look P 877-988-3784 x280
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

150 East 42nd Street
New York, NY 10017
Ph: 212-490-3000
www.wilsonelser.com

COMPANY CONTACTS

Thomas W. Wilson, Jr. P 212-915-5145
thomas.wilsonjr@wilsonelser.com

Ryan Turner P 212-915-6018
ryan.turner@wilsonelser.com

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.

TECHNOLOGY



**BLUE
GOOSE**
TECHNOLOGY
SOLUTIONS, INC.

BLUE GOOSE TECHNOLOGY SOLUTIONS, INC.

9431 Island Point Road
Sherrills Ford, NC 28673

Ph: 828-478-7381
www.bluegoose.us

COMPANY CONTACTS

Keith Aderhold P 828-478-7381
kaderhold@bluegoose.us

OVERVIEW OF COMPANY

Blue Goose specializes in providing MGA's, Wholesalers and Program Managers the "Next Generation" of Policy Administration, Underwriting Workflow and Insurance Billing and Accounting solutions. Our Rules Based Underwriting System can be configured to work with your LOB's and Carriers. It is integrated with our Accounting and Billing System and our Agent / Broker Portal. And you can choose to use our custom Rating Solutions or we can integrate with your 3rd party Rater or Raters.

PRODUCTS & SERVICES

Our system is a .Net/SQL Based Policy Administration System with integrated Rules Based Underwriting Workflow. We offer modules to automate your workflow. Choose our ACORD Form Data Capture, Agent Broker Portal, Advanced Document Management System and Policy Issuance by LOB. Our Rules Based Underwriting System is configured to work with your LOB's and Carriers. Our Accounting System is the most robust Insurance Billing and Accounting System in the industry.



CoreLogic

CORELOGIC/RISKMETER ONLINE

125 Broad Street, 2nd Floor
Boston, MA 02110

Ph: 617-737-4444
www.RiskMeter.com

COMPANY CONTACTS

Bradley Sherwin P 617-737-4444
bsherwin@corelogic.com

Dan Munson P 617-737-4444
dmunson@corelogic.com

OVERVIEW OF COMPANY

On January 18, 2013 **CoreLogic**® (CLGX), a leading residential property information, analytics and services provider, announced the acquisition of CDS Business Mapping, LLC (CDS). CDS's RiskMeter Online™ delivers critical underwriting information to over 700 insurance carriers, agents and brokers through real-time reports that identify property specific hazards. RiskMeter Online, based in Middletown, CT offers various automated delivery methods, including: single address, batch/book of business processing and Web Services. For more information, visit: www.RiskMeter.com

PRODUCTS & SERVICES

For property underwriters and agents who are looking to increase accuracy, productivity and overall speed of operations, the RiskMeter Online is an Internet application used to automate property risk reports. By simply typing in an address or uploading a book of business, users can get back natural hazard information for a given policy location. RiskMeter Online can return more than 30 different reports, including: Distance to Coast, Rating Territory, **CoreLogic** Flood Risk Score, Proximity to Brush, AAL & PML metrics and much more.



COUNTERPOINT SOFTWARE, INC.

1901 N. Lincoln Street
Wilmington, DE 19806
www.counterpointsoftwareinc.com

COMPANY CONTACTS

Alan Yandziak P 302-426-6500
alan@counterpointsoftwareinc.com

Ron Turochy P 302-426-6500
ron@counterpointsoftwareinc.com

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's technology is cloud-based and modular so you can choose your own components, add more as you grow, and access them worldwide through any web browser.

PRODUCTS & SERVICES

- Cloud-based rating, quoting and binding—we can automate your rating spreadsheets
- Policy administration—fully automates the process and compiles all 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



EPIC-PREMIER INSURANCE SOLUTIONS INC.

4223 S. Pipkin Road
Lakeland, FL 33811
Ph: 888-999-7736
www.epic-premier.com

COMPANY CONTACTS

Mike Cross P 888-999-7736
mccross@epic-premier.com

Tony Mathewson P 888-999-7736
tmathewson@epic-premier.com

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
Shelton, CT 06484
Ph: 203-402-0800
www.i-engineering.com

COMPANY CONTACTS

Naval Kapoor P 203-402-0800
n.kapoor@i-engineering.com
Chris Hiles P 636-236-9390
c.hiles@i-engineering.com

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

iNet Suite—iNet Insurance Manager, iNet Policy Manager, iNet Payment Manager, iNet Connect, iNet Premium Spider, iNet Premium Comparator E&S

ALIST™—It's all in one place.—Business Manager, Policy Issuance and Management, Rating and Rule Engines, Workflow Management, Document Management, Accounting, Claims and Reporting and Agent Portal

London Markets—iNet Coverholder, iNet Bordereaux Builder



INTEC

1811 Centre Point Circle, Ste 115
Naperville, IL 60563
Ph: 678-460-4055
www.instec-corp.com

COMPANY CONTACTS

William T. Budde P 630-955-9200
bbudde@instec-corp.com

OVERVIEW OF COMPANY

Instec, founded in 1982, is a leading provider of services and technology to the commercial property and casualty insurance industry. Noted for long-term client relationships, Instec is a partner in providing business expertise and creating profitable growth. As providers of full policy lifecycle management, Instec works with its clients on successful Program Business as well as streamlining operations from first quote to last endorsement.

PRODUCTS & SERVICES

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. 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.

**INSURE LEARN**

3811 N. 24th Street
 Phoenix, AZ 85016
 Ph: 602-956-3330
 www.insurelearn.com

COMPANY CONTACTS

Josh Wagner P 602-956-6959 x23
 joshw@insurelearn.com
Steve Haws P 602-956-6959 x25
 steve@insurelearn.com

OVERVIEW OF COMPANY

Insure Learn is an e-learning company based in Phoenix, AZ with over 15 years experience developing engaging online training applications. 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.

**NETRATE SYSTEMS**

3493 Woods Edge Drive
 Okemos, MI 48864
 Ph: 866-541-4900
 www.NetRate.com

COMPANY CONTACTS

Tom Rahl P 517-347-4900 x113
 trahl@netrate.com
Rob Zuzula P 517-347-4900 x115
 rzuzula@netrate.com

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

100 TechneCenter Drive, Suite 125
Milford, OH 45150
Ph: 513-943-0000
www.NxTechCorp.com

COMPANY CONTACTS

Rex Fledderjohn P 513-943-0000 x105
rfledderjohn@NxTechCorp.com
Janice Sheffield P 513-943-0000 x107
jsheffield@NxTechCorp.com

OVERVIEW OF COMPANY

NxTech, Inc is a leading P&C software and services provider headquartered in Milford, Ohio (a Cincinnati suburb) that helps streamline business workflows between program administrators/GAs, retail agents and carriers through the electronic exchange of data. With NxTech's proven solutions you can eliminate keystrokes and:

- Get more quotes to market, faster.
- 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

With 30 years of P&C industry leadership, NxTech is doing more than talking about interface and transforming workflows in the E&S/Program Business market. We have implemented solutions that have helped our clients achieve business results - real time rating bridges between program administrators and carriers, policy and claim download to agent systems, real time access to information and agent portals. Leverage your system investments and our expertise. Contact NxTech today to learn more about the NxTech Total Interface Solution™, powered by ConneXt™ software and services.



QUALCORP, INC.

27240 Turnberry Lane, Suite 200
Valencia, CA 91355
Ph: 661-799-0033
www.qualcorp.com

COMPANY CONTACTS

Allen Beggs P 661-799-0033
abeggs@qualcorp.com

OVERVIEW OF COMPANY

QualCorp, Inc. was founded in 1992. We are a privately held company located in Valencia, CA. With customers such as Lexington Insurance Company, QBE of the Americas and HIIG, QualCorp, Inc. caters to the unique business needs of large insurance carriers to mid-size MGA's. With 15 years of service to the insurance industry, our staff possesses the necessary experience to bring new customers to market faster than our competitors and to maintain the ever changing needs of our existing client base. QualCorp, Inc. maintains a full testing environment to duplicate our customer's environment prior to new software being deployed.

PRODUCTS & SERVICES

QualCorp, Inc's flagship product, FormsPlus, is a LAN/Web-based policy issuance/administration solution. FormsPlus was designed to automate any line of business—personal/commercial & workers' Compensation policy's and all of their subsequent transactions for any carrier in all 50 states. Our .Net Distribution Tool affords our customers the ability to distribute different policy sets to different locations over the Internet. FormsPlus imports data from various rating partners via an XML stream and exports data via XML to insurance companies for statistical reporting, accounting and claims. With this latest R&D effort by QualCorp, Inc. FormsPlus satisfies the requirements of the most demanding enterprise clients in America.



SPECIALIZED BUSINESS SOFTWARE, INC.

6325 Cochran Road, Unit 1
Solon, Ohio 44139
Ph: 866-328-4936
www.specializedbusinesssoftware.com

COMPANY CONTACTS

Steve Wiser P 440-542-9145
steve@specializedbusinesssoftware.com

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.



VIRTUAL MGA LTD.

6500 River Place Blvd, Bldg 2, Ste 425
Austin, Texas 78730
Ph: 512-582-8000
www.virtualmga.com

COMPANY CONTACTS

Jake Hampton P 512-582-8000
jake.hampton@virtualmga.com
Matt Young P 512-582-8001
matt.young@virtualmga.com

OVERVIEW OF COMPANY

Virtual MGA specializes in the facilitating the distribution of insurance products between underwriters and their trading partners. Virtual MGA is based in Austin, Texas with clients in the US, Canada, and the UK. The management team at Virtual MGA has its roots in insurance operations and the Virtual MGA platform was designed from an insurance professional perspective and is therefore intuitive for most insurance professionals.

PRODUCTS & SERVICES

The Virtual MGA trading platform enables underwriters to distribute their insurance products on-line so that they can interact more efficiently with their producers. Examples of typical trading partner relationships are program managers with their retail trading partners or Lloyd’s brokers and syndicates with their Coverholders. The on-line transaction platform provides all the functionality required to complete an insurance placement: rate, quote, negotiate, proposal, bind, policy issuance, endorsement processing, and bordereaux production.



VRC INSURANCE SYSTEMS

32121 Lindero Canyon Road, Ste 100
Westlake Village, CA 91361
www.vrcis.com

COMPANY CONTACTS

W. Patrick McGinty P 818-827-2167
pmcginty@vrcis.com

Kevin Paul P 818-827-2172
kpaul@vrcis.com

OVERVIEW OF COMPANY

Be nimble, be quick, jump over your candlestick with Velocity from VRC Insurance Systems! Velocity is a premier information technology management platform that provides its users with rapidly deployable leading edge technology that does not require rocket scientists' credentials. Program administrators enjoy the flexibility, rapid response and outstanding performance to step up to today's ever changing environment. 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 Velocity are fully integrated and include:

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



MGAs | Wholesale Brokers | Program Managers | Specialty Carriers

Your business relies on systems working together.

We make that happen.

Our ConceptOne™ software is highly configurable which allows your business to drive the way our software works, not the other way around.

Epic-Premier works as your partner to provide both the software and service related components of an integrated, enterprise-level solution to accomplish your business automation strategy.



More than software. Solutions.

epic-premier.com
888.999.7736



TMPAA VENDOR PARTNERS

TMPAA VENDOR PARTNERS

TSE indicates Trade Show Exhibitor

Advisen, Ltd.
Afco Direct
Altamont Capital Partners
American Claims Management
Athens Administrators
Axiom Development **TSE**
Berkley Risk Administrators Company
Bill It Now **TSE**
Blue Goose Technologies, Inc. **TSE**
Carl Warren & Company
CBCS, Inc. **TSE**
ClearRisk, Inc.
Contego Services Group, LLC
CoreLogic/RiskMeter Online **TSE**
Cost Financial Group, Inc. **TSE**
Counterpoint Software, Inc. **TSE**
Crawford & Co.
CSC
Dowling Hales
Dragonflyware, LLC **TSE**
Empirical Loss Management, LLC
Engle Martin & Associates, Inc.
Epic-Premier Insurance Solutions, Inc. **TSE**
ePlace Solutions, Inc.
Gallagher Bassett Services, Inc. **TSE**
Griffin Financial Group, LLC
I-Engineering, Inc. **TSE**
Imperial PFS **TSE**
Input 1, LLC **TSE**
Instec **TSE**
Insurance Recruiting Specialists
Insure Learn **TSE**
International Insurance Consultants **TSE**
Island Financial Insurance Assoc., Inc. **TSE**
Johnson Lambert LLP
The Kingstree Group
Lloyd's America, Inc.
MarshBerry
Martin & Company **TSE**
Milliman, Inc. **TSE**
MIS Insurance Services
Mutual Boiler Re
Mystic Capital
NetRate Systems, Inc. **TSE**
North American Risk Services, Inc. **TSE**
NxTech, Incorporated **TSE**
Oak Street Funding **TSE**
Overland Solutions, Inc. **TSE**
Paradigm Management Services, LLC
Perr & Knight, Inc. **TSE**
Professional Claims Managers Inc. **TSE**
Promotions Kartel **TSE**
QualCorp **TSE**
Raphael and Associates
Regional Reporting, Inc. **TSE**
ReSource Pro **TSE**
Sedgwick
SeQure Underwriters
Specialized Business Software **TSE**
Specialty Claims Management
Sterne Agee
Supportive Insurance Services LLC **TSE**
TRISTAR Risk Management **TSE**
Tysers **TSE**
Vantage Agora Inc. **TSE**
VeriClaim Inc.
Vertafore, Inc.
Vertibrands, Inc. **TSE**
Virtual MGA Ltd. Co. **TSE**
VRC Insurance Systems **TSE**
Wilson Elser
York Programs **TSE**

when you think process, do you see profit?



We do. With a focus on insurance and expertise in over 1000 back office tasks, we're able to deliver powerful processes with extraordinary efficiency. Let us handle your processing, while you work on all the possibilities.



ReSourcePro
do what counts.

1-888-577-7552

Great Marketing Results

Aren't Pie In The Sky!



Video – Eye On Insurance news videos highlight leading programs

Award-winning creative

Domain expertise – 15 years of insurance marketing

CAST – Customized Agency Sales Tools enhance broker efforts

NAPSLO Marketing Awards 2012 - 1st Place

IMCA Marketing Awards 2012 - Best in Show

TMPAA Marketing Awards 2012 - 1st & 3rd Place



Vertibrands Serves Up Award-Winning Marketing to Leading Specialty Program Administrators

Stop by our booth for a takeaway or visit www.vertibrands.com.



VERTIBRANDS™

Insuring Marketing Success for MGAs

877-988-3784 ext 280

