

STATE OF TEXAS §
 §
 COUNTY OF FORT BEND §

**AGREEMENT FOR BROKER OF RECORD SERVICES
 BETWEEN FORT BEND COUNTY AND MCGRIFF INSURANCE SERVICES, LLC
 PURSUANT TO RFP 24-014**

THIS AGREEMENT is made and entered into by and between Fort Bend County, (hereinafter "County"), a body corporate and politic under the laws of the State of Texas, and McGriff Insurance Services, LLC, (hereinafter "Contractor"), a company authorized to conduct business in the State of Texas. County and Contractor shall be known collectively as "the Parties" and singularly as "Party."

WITNESSETH

WHEREAS, County desires that Contractor provide Broker of Record Services (hereinafter "Services") pursuant to RFP 24-014; and

WHEREAS, Contractor represents that it is qualified and desires to perform such services.

NOW, THEREFORE, in consideration of the mutual covenants and conditions set forth below, the parties agree as follows:

AGREEMENT

Section 1. Services

- A. Contractor shall render insurance broker of record services with respect to the County's property and casualty insurance program. Services shall comply with Fort Bend County's Insurance Broker of Record Request for Proposals RFP 24-014 solicitation document (incorporated and attached hereto as Exhibit A) and shall be delivered as detailed in Contractor's Proposal for Insurance Broker of Record RFP 24-014 (incorporated and attached hereto as Exhibit B):
- B. The term of this Agreement is for a period of twenty-four (24) months, commencing on or near April 1, 2024 through March 31, 2026, with three (3) additional one-year renewal options under the same terms and conditions if mutually agreeable to both parties. Either party for any reason may terminate this Agreement, as provided for in Section 6 of this Agreement.

Section 2. Personnel

- A. Contractor represents that it presently has, or is able to obtain, adequate qualified personnel in its employment for the timely performance of the Scope of Services required under this Agreement and that Contractor shall furnish and maintain, at its own expense, adequate and sufficient personnel, in the opinion of County, to perform the Scope of Services when and as required and without delays.
- B. All employees of Contractor shall have such knowledge and experience as will enable them to perform the duties assigned to them. Any employee of Contractor who, in the opinion of County, is incompetent or by his conduct becomes detrimental to the project shall, upon request of County, immediately be removed from association with the project.

Section 3. Compensation and Payment

- A. The Maximum Compensation for the performance of Services within the Scope of Services described in Section 1 is eighty-six thousand and 00/100 dollars (\$86,000.00) per one year contract period. In no case shall the amount paid by County under this Agreement exceed the Maximum Compensation without an approved change order. This Maximum Compensation shall supersede any contrary amount listed in any attached document, if applicable.
- B. All performance of the Scope of Services by Contractor including any changes in the Scope of Services and revision of work satisfactorily performed will be performed only when approved in advance and authorized by County.
- C. County will pay Contractor based on the following procedures: Upon completion of the tasks identified in the Scope of Services, Contractor shall submit to County two (2) original copies of invoices showing the amounts due for services performed in a form acceptable to County. Contractor may submit electronically via: apauditor@fortbendcountytexas.gov. County shall review such invoices and approve them within 30 calendar days with such modifications as are consistent with this Agreement and forward same to the Auditor for processing. County shall pay each such approved invoice within thirty (30) calendar days. County reserves the right to withhold payment pending verification of satisfactory work performed.

Section 4. Limit of Appropriation

- A. Contractor clearly understands and agrees, such understanding and agreement being of the absolute essence of this Agreement, that County shall have available the total maximum sum of eighty-six thousand and 00/100 dollars (\$86,000.00) per one year contract period, specifically allocated to fully discharge any and all liabilities County may incur.
- B. Contractor does further understand and agree, said understanding and agreement also being of the absolute essence of this Agreement, that the total maximum compensation that Contractor may become entitled to and the total maximum sum that County may

become liable to pay to Contractor shall not under any conditions, circumstances, or interpretations thereof exceed eighty-six thousand and 00/100 dollars (\$86,000.00) per one year contract period.

- C. It is specifically understood and agreed that in the event no funds or insufficient funds are appropriated by Fort Bend County under this Agreement, Fort Bend County shall notify all necessary parties that this Agreement shall thereafter terminate and be null and void on the last day of the fiscal period for which appropriations were made without penalty, liability or expense to Fort Bend County.

Section 5. Modifications and Waivers

- A. The parties may not amend or waive this Agreement, except by a written agreement executed by both parties.
- B. No failure or delay in exercising any right or remedy or requiring the satisfaction of any condition under this Agreement, and no course of dealing between the parties, operates as a waiver or estoppel of any right, remedy, or condition.
- C. The rights and remedies of the parties set forth in this Agreement are not exclusive of, but are cumulative to, any rights or remedies now or subsequently existing at law, in equity, or by statute.

Section 6. Termination

- A. Termination for Convenience: County may terminate this Agreement at any time upon thirty (30) days written notice.
- B. Termination for Default
 - 1. County may terminate the whole or any part of this Agreement for cause in the following circumstances:
 - a. If Contractor fails to perform services within the time specified in the Scope of Services or any extension thereof granted by the County in writing;
 - b. If Contractor materially breaches any of the covenants or terms and conditions set forth in this Agreement or fails to perform any of the other provisions of this Agreement or so fails to make progress as to endanger performance of this Agreement in accordance with its terms, and in any of these circumstances does not cure such breach or failure to County's reasonable satisfaction within a period of ten (10) calendar days after receipt of notice from County specifying such breach or failure.

2. If, after termination, it is determined for any reason whatsoever that Contractor was not in default, or that the default was excusable, the rights and obligations of the parties shall be the same as if the termination had been issued for the convenience of the County in accordance with Section 6A above.
- C. Upon termination of this Agreement, County shall compensate Contractor in accordance with Section 3, above, for those services which were provided under this Agreement prior to its termination and which have not been previously invoiced to County. Contractor's final invoice for said services will be presented to and paid by County in the same manner set forth in Section 3 above.
- D. If County terminates this Agreement as provided in this Section, no fees of any type, other than fees due and payable at the Termination Date, shall thereafter be paid to Contractor.

Section 7. Ownership and Reuse of Documents

All documents, data, reports, research, graphic presentation materials, etc., developed by Contractor as a part of its work under this Agreement, shall become the property of County upon completion of this Agreement, or in the event of termination or cancellation thereof, at the time of payment under Section 3 for work performed. Contractor shall promptly furnish all such data and material to County on request.

Section 8. Inspection of Books and Records

Contractor will permit County, or any duly authorized agent of County, to inspect and examine the books and records of Contractor for the purpose of verifying the amount of work performed under the Scope of Services. County's right to inspect survives the termination of this Agreement for a period of four years.

Section 9. Insurance

- A. Prior to commencement of the Services, Contractor shall furnish County with properly executed certificates of insurance which shall evidence all insurance required. In the event of cancellation of any of the identified insurance policies, Contractor shall replace such coverage with no gap of coverage during the policy period. Contractor shall maintain such insurance coverage from the time Services commence until Services are completed and provide replacement certificates for any such insurance expiring prior to completion of Services. Contractor shall obtain such insurance written on an Occurrence form or claims-made form as applicable to professional liability/errors and omissions insurance. from such companies having Bests rating of A/VII or better, licensed or approved to transact business in the State of Texas, and shall obtain such insurance of the following types and minimum limits:
 1. Workers' Compensation insurance. Substitutes to genuine Workers' Compensation Insurance will not be allowed. Employers' Liability insurance

with limits of not less than \$1,000,000 per injury by accident, \$1,000,000 per injury by disease, and \$1,000,000 per bodily injury by disease.

2. Commercial general liability insurance with a limit of not less than \$1,000,000 each occurrence and \$2,000,000 in the annual aggregate. Policy shall cover liability for bodily injury, personal injury, and property damage and products/completed operations arising out of the business operations of the policyholder.
 3. Business Automobile Liability insurance with a combined Bodily Injury/Property Damage limit of not less than \$1,000,000 each accident. The policy shall cover liability arising from the operation of licensed vehicles by policyholder.
 4. Professional Liability insurance with limits not less than \$1,000,000.
 5. Errors and Omissions Professional Liability insurance with a limit of \$10,000,000.
- B. County and the members of Commissioners Court shall be named as additional insured to all required coverage except for Workers' Compensation and Professional Liability/Errors and Omissions Professional Liability. All Liability policies written on behalf of Contractor shall contain a waiver of subrogation in favor of County and members of Commissioners Court. For Commercial General Liability, the County shall be named as an Additional Insured on a Primary & Non-Contributory basis.
- C. If required coverage is written on a claims-made basis, Contractor warrants that any retroactive date applicable to coverage under the policy precedes the effective date of the contract; and that continuous coverage will be maintained or an extended discovery period will be exercised for a period of 2 years beginning from the time that work under the Agreement is completed.

Section 10. Indemnity

CONTRACTOR SHALL INDEMNIFY AND DEFEND COUNTY AGAINST ALL LOSSES, LIABILITIES, CLAIMS, CAUSES OF ACTION, AND OTHER EXPENSES, INCLUDING REASONABLE ATTORNEYS FEES, ARISING FROM ACTIVITIES OF CONTRACTOR, ITS AGENTS, SERVANTS OR EMPLOYEES, PERFORMED UNDER THIS AGREEMENT THAT RESULT FROM THE NEGLIGENT ACT, ERROR, OR OMISSION OF CONTRACTOR OR ANY OF CONTRACTOR'S AGENTS, SERVANTS OR EMPLOYEES.

Section 11. Confidential and Proprietary Information

- A. Contractor acknowledges that it and its employees or agents may, in the course of performing their responsibilities under this Agreement, be exposed to or acquire information that is confidential to County. Any and all information of any form obtained

by Contractor or its employees or agents from County in the performance of this Agreement shall be deemed to be confidential information of County ("Confidential Information"). Any reports or other documents or items (including software) that result from the use of the Confidential Information by Contractor shall be treated with respect to confidentiality in the same manner as the Confidential Information. Confidential Information shall be deemed not to include information that (a) is or becomes (other than by disclosure by Contractor) publicly known or is contained in a publicly available document; (b) is rightfully in Contractor's possession without the obligation of nondisclosure prior to the time of its disclosure under this Agreement; or (c) is independently developed by employees or agents of Contractor who can be shown to have had no access to the Confidential Information.

- B. Contractor agrees to hold Confidential Information in strict confidence, using at least the same degree of care that Contractor uses in maintaining the confidentiality of its own confidential information, and not to copy, reproduce, sell, assign, license, market, transfer or otherwise dispose of, give, or disclose Confidential Information to third parties or use Confidential Information for any purposes whatsoever other than the provision of Services to County hereunder, and to advise each of its employees and agents of their obligations to keep Confidential Information confidential. Contractor shall use its best efforts to assist County in identifying and preventing any unauthorized use or disclosure of any Confidential Information. Without limitation of the foregoing, Contractor shall advise County immediately in the event Contractor learns or has reason to believe that any person who has had access to Confidential Information has violated or intends to violate the terms of this Agreement and Contractor will at its expense cooperate with County in seeking injunctive or other equitable relief in the name of County or Contractor against any such person. Contractor agrees that, except as directed by County, Contractor will not at any time during or after the term of this Agreement disclose, directly or indirectly, any Confidential Information to any person, and that upon termination of this Agreement or at County's request, Contractor will promptly turn over to County all documents, papers, and other matter in Contractor's possession which embody Confidential Information.
- C. Contractor acknowledges that a breach of this Section, including disclosure of any Confidential Information, or disclosure of other information that, at law or in equity, ought to remain confidential, will give rise to irreparable injury to County that is inadequately compensable in damages. Accordingly, County may seek and obtain injunctive relief against the breach or threatened breach of the foregoing undertakings, in addition to any other legal remedies that may be available. Contractor acknowledges and agrees that the covenants contained herein are necessary for the protection of the legitimate business interest of County and are reasonable in scope and content.
- D. Contractor in providing all services hereunder agrees to abide by the provisions of any applicable Federal or State Data Privacy Act.

- E. Contractor expressly acknowledges that County is subject to the Texas Public Information Act, TEX. GOV'T CODE ANN. §§ 552.001 et seq., as amended, and notwithstanding any provision in the Agreement to the contrary, County will make any information related to the Agreement, or otherwise, available to third parties in accordance with the Texas Public Information Act. Any proprietary or confidential information marked as such provided to County by Contractor shall not be disclosed to any third party, except as directed by the Texas Attorney General in response to a request for such under the Texas Public Information Act, which provides for notice to the owner of such marked information and the opportunity for the owner of such information to notify the Attorney General of the reasons why such information should not be disclosed. The terms and conditions of the Agreement are not proprietary or confidential information.

Section 12. Independent Contractor

- A. In the performance of work or services hereunder, Contractor shall be deemed an independent contractor, and any of its agents, employees, officers, or volunteers performing work required hereunder shall be deemed solely as employees of contractor or, where permitted, of its subcontractors.
- B. Contractor and its agents, employees, officers, or volunteers shall not, by performing work pursuant to this Agreement, be deemed to be employees, agents, or servants of County and shall not be entitled to any of the privileges or benefits of County employment.

Section 13. Notices

- A. Each party giving any notice or making any request, demand, or other communication (each, a "Notice") pursuant to this Agreement shall do so in writing and shall use one of the following methods of delivery, each of which, for purposes of this Agreement, is a writing: personal delivery, registered or certified mail (in each case, return receipt requested and postage prepaid), or nationally recognized overnight courier (with all fees prepaid).
- B. Each party giving a Notice shall address the Notice to the receiving party at the address listed below or to another address designated by a party in a Notice pursuant to this Section:

County: Fort Bend County
ATTN: Risk Management Director
301 Jackson Street, Ste. 224
Richmond, TX 77469

With a copy to: Fort Bend County
Attn: County Judge
401 Jackson Street, 1st Floor
Richmond, Texas 77469

Contractor: McGriff Insurance Services, LLC
10100 Katy Freeway, Ste. 400
Houston, TX 77043-5272

C. Notice is effective only if the party giving or making the Notice has complied with subsections 13.1 and 13.2 and if the addressee has received the Notice. A Notice is deemed received as follows:

1. If the Notice is delivered in person, or sent by registered or certified mail or a nationally recognized overnight courier, upon receipt as indicated by the date on the signed receipt.
2. If the addressee rejects or otherwise refuses to accept the Notice, or if the Notice cannot be delivered because of a change in address for which no Notice was given, then upon the rejection, refusal, or inability to deliver.

Section 14. Compliance with Laws

Contractor shall comply with all federal, state, and local laws, statutes, ordinances, rules and regulations, and the orders and decrees of any courts or administrative bodies or tribunals in any matter affecting the performance of this Agreement, including, without limitation, Worker's Compensation laws, minimum and maximum salary and wage statutes and regulations, licensing laws and regulations. When required by County, Contractor shall furnish County with certification of compliance with said laws, statutes, ordinances, rules, regulations, orders, and decrees above specified.

Section 15. Performance Warranty

- A. Contractor warrants to County that Contractor has the skill and knowledge ordinarily possessed by well-informed members of its trade or profession practicing in the greater Houston metropolitan area and Contractor will apply that skill and knowledge with care and diligence to ensure that the Services provided hereunder will be performed and delivered in accordance with the highest professional standards.
- B. Contractor warrants to County that the Services will be free from material errors and will materially conform to all requirements and specifications contained in the attached Exhibits A and B.

Section 16. Assignment and Delegation

- A. Neither party may assign any of its rights under this Agreement, except with the prior written consent of the other party. That party shall not unreasonably withhold its consent. All assignments of rights are prohibited under this subsection, whether they are voluntarily or involuntarily, by merger, consolidation, dissolution, operation of law, or any other manner.
- B. Neither party may delegate any performance under this Agreement.
- C. Any purported assignment of rights or delegation of performance in violation of this Section is void.

Section 17. Applicable Law

The laws of the State of Texas govern all disputes arising out of or relating to this Agreement. The parties hereto acknowledge that venue is proper in Fort Bend County, Texas, for all legal actions or proceedings arising out of or relating to this Agreement and waive the right to sue or be sued elsewhere. Nothing in the Agreement shall be construed to waive the County's sovereign immunity.

Section 18. Successors and Assigns

County and Contractor bind themselves and their successors, executors, administrators and assigns to the other party of this Agreement and to the successors, executors, administrators and assigns of the other party, in respect to all covenants of this Agreement.

Section 19. Third Party Beneficiaries

This Agreement does not confer any enforceable rights or remedies upon any person other than the parties.

Section 20. Severability

If any provision of this Agreement is determined to be invalid, illegal, or unenforceable, the remaining provisions remain in full force, if the essential terms and conditions of this Agreement for each party remain valid, binding, and enforceable.

Section 21. Publicity

Contact with citizens of Fort Bend County, media outlets, or governmental agencies shall be the sole responsibility of County. Under no circumstances whatsoever, shall Contractor release any material or information developed or received in the performance of the Services

hereunder without the express written permission of County, except where required to do so by law.

Section 22. Captions

The section captions used in this Agreement are for convenience of reference only and do not affect the interpretation or construction of this Agreement.

Section 23. Conflict

This Agreement contains the entire Agreement among the parties and supersedes all other negotiations and agreements, whether written or oral. Attached hereto is Exhibit A: Fort Bend County's Insurance Broker of Record Request for Proposals RFP 24-014 solicitation document and Exhibit B: Contractor's Proposal for Insurance Broker of Record RFP 24-014.; both documents are incorporated by reference as if set forth herein verbatim for all purposes. In the event of a conflict between the documents, the order of precedence shall be as follows: (1) this Agreement and any amendment thereto; (2) Exhibit A: Fort Bend County's Insurance Broker of Record Request for Proposals RFP 24-014 solicitation document and last Exhibit B: Contractor's Proposal for Insurance Broker of Record RFP 24-014.

Section 24. Certain State Law Requirements for Contracts

The contents of this Section are required by Texas law and are included by County regardless of content For purposes of Sections 2252.152, 2271.002, and 2274.002, Texas Government Code, as amended, Contractor hereby verifies that Contractor and any parent company, wholly owned subsidiary, majority-owned subsidiary, and affiliate:

- A. Unless affirmatively declared by the United States government to be excluded from its federal sanctions regime relating to Sudan or Iran or any federal sanctions regime relating to a foreign terrorist organization, is not identified on a list prepared and maintained by the Texas Comptroller of Public Accounts under Section 806.051, 807.051, or 2252.153 of the Texas Government Code.
- B. If employing ten (10) or more full-time employees and this Agreement has a value of \$100,000.00 or more, Contractor does not boycott Israel and is authorized to agree in such contracts not to boycott Israel during the term of such contracts. "Boycott Israel" has the meaning provided in § 808.001 of the Texas Government Code.
- C. If employing ten (10) or more full-time employees and this Agreement has a value of \$100,000.00 or more, Contractor does not boycott energy companies and is authorized to agree in such contracts not to boycott energy companies during the term of such contracts. "Boycott energy company" has the meaning provided in § 809.001 of the Texas Government Code.

- D. If employing ten (10) or more full-time employees and this Agreement has a value of \$100,000.00 or more, Contractor does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association and is authorized to agree in such contracts not to discriminate against a firearm entity or firearm trade association during the term of such contracts. "Discriminate against a firearm entity or firearm trade association" has the meaning provided in § 2274.001(3) of the Texas Government Code. "Firearm entity" and "firearm trade association" have the meanings provided in § 2274.001(6) and (7) of the Texas Government Code.

Section 25. Human Trafficking

BY ACCEPTANCE OF THIS AGREEMENT, STOA ACKNOWLEDGES THAT FORT BEND COUNTY IS OPPOSED TO HUMAN TRAFFICKING AND THAT NO COUNTY FUNDS WILL BE USED IN SUPPORT OF SERVICES OR ACTIVITIES THAT VIOLATE HUMAN TRAFFICKING LAWS.

{REMAINDER OF PAGE INTENTIONALLY LEFT BLANK}

{EXECUTION PAGE TO FOLLOW}

IN WITNESS WHEREOF, and intending to be legally bound, County and Contractor hereto have executed this Agreement to be effective on the date signed by the last Party hereto.

FORT BEND COUNTY

KP George
KP George, County Judge

3.26.2024
Date

ATTEST:

Laura Richard
Laura Richard, County Clerk



MCGRIFF INSURANCE SERVICES, LLC

Joseph Blasi
Authorized Agent- Signature

Joseph Blasi
Authorized Agent- Printed Name

S.V.P.
Title

3/7/24
Date

APPROVED:

[Signature]
Department Head

AUDITOR'S CERTIFICATE

I hereby certify that funds are available in the amount of \$ 86,000.00 to accomplish and pay the obligation of Fort Bend County under this contract.

Robert "Ed" Sturdivant
Robert "Ed" Sturdivant, County Auditor

Exhibit A: Fort Bend County's Insurance Broker of Record Request for Proposals RFP.24-014 Solicitation Document

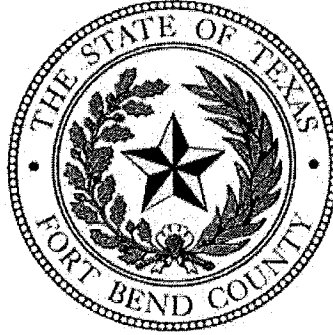
Exhibit B: Contractor's Proposal for Insurance Broker of Record RFP 24-014

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EXHIBIT A

Fort Bend County's Insurance Broker of Record Request for Proposals
RFP 24-014 Solicitation Document

*Fort Bend County, Texas
Request for Proposals*



*Insurance Broker of Record
RFP 24-014*

SUBMIT SEALED PROPOSALS TO:

Fort Bend County
Purchasing Department
Travis Annex
301 Jackson, Suite 201
Richmond, TX 77469

Note: All correspondence must include the term
“Purchasing Department” in address to assist in
proper delivery.

SUBMIT NO LATER THAN:

Tuesday, December 19, 2023
2:00 PM (Central)

LABEL SEALED ENVELOPE/BOX:

RFP 24-014
Insurance Broker of Record

*ALL RFPs MUST BE RECEIVED IN AND TIME/DATE STAMPED BY THE PURCHASING OFFICE
OF FORT BEND COUNTY ON OR BEFORE THE SPECIFIED TIME/DATE STATED ABOVE.*

RFPs RECEIVED AS REQUIRED WILL THEN BE OPENED AND NAMES PUBLICLY READ.

RFPs RECEIVED AFTER THE SPECIFIED TIME, WILL BE RETURNED UNOPENED.

Result will be provide, upon request,
after final agreement is approved by
Commissioners Court.

Requests for information must be in
writing and directed to:
Cheryl Krejci, CPPB
Assistant County Purchasing Agent
Cheryl.Krejci@fortbendcountytexas.gov

Vendor Responsibilities:

- Download and complete any addendums. (Addendums will be posted on the Fort Bend County website no
Later than 48 hours prior to bid opening)
- Submit response in accordance with requirements stated on the cover of this document.
- DO NOT submit responses via email or fax.



COUNTY PURCHASING AGENT
Fort Bend County, Texas

Vendor Information

Jaime Kovar
Purchasing Agent

Office (281) 341-8640

Legal Company Name (top line of W9)					
Business Name (if different from legal name)					
Type of Business	☐ Corporation/LLC	☐ Partnership	Age in Business?		
	☐ Sole Proprietor/Individual	☐ Tax Exempt			
Federal ID # or S.S. #			SAM.gov Unique Entity ID #		
SAM.gov CAGE / NCAGE					
Publicly Traded Business	___ No ___ Yes Ticker Symbol _____				
Remittance Address					
City/State/Zip					
Physical Address					
City/State/Zip					
Phone Number					
E-mail					
Contact Person					
Check all that apply to the company listed above and provide certification number.	DBE-Disadvantaged Business Enterprise ☐ SBE-Small Business Enterprise ☐ HUB-Texas Historically Underutilized Business ☐ WBE-Women's Business Enterprise ☐		Certification # _____ Certification # _____ Certification # _____ Certification # _____		Cert Date _____ _____ _____ _____
Company's gross annual receipts	<\$500,000 _____		\$500,000-\$4,999,999 _____		
	\$5,000,000-\$16,999,999 _____		\$17,000,000-\$22,399,999 _____ >\$22,400,000 _____		
NAICs codes (Please enter all that apply)					
Signature of Authorized Representative					
Printed Name					
Title					
Date					

THIS FORM MUST BE SUBMITTED WITH THE SOLICITATION RESPONSE

1.0 INTRODUCTION:

Fort Bend County, Texas (hereafter referred to as the (“County”) seeks sealed Proposals (“Proposals or RFP”) from qualified firms seeking to act as an insurance broker of record (“Respondent”) with respect to the County’s property and casualty insurance program. Respondents must offer a proposal that will meet the scope of services, qualifications and general description of work activities identified in the RFP.

It is the County's intention and expectation to pay a fixed sum only for the provision of those services, including all out-of-pocket expenses. The initial contract period and renewal(s) are based solely on the County’s discretion and judgment.

2.0 GUIDELINES:

By virtue of submitting a proposal, interested parties are acknowledging:

- 2.1 The County reserves the right to reject any or all proposals if it determines that select proposals are not responsive to the RFP. The County reserves the right to reconsider any proposal submitted at any phase of the procurement. It also reserves the right to meet with select Respondents at any time to gather additional information. Furthermore, the County reserves the right to delete or add scope up until the final contract signing.
- 2.2 All Respondents submitting proposals agree that their pricing is valid for a minimum of ninety (90) days after proposal submission to the County. Furthermore, the County is by statute exempt from the State Sales Tax and Federal Excise Tax; therefore, proposal prices shall not include taxes.
- 2.3 This Proposal does not commit the County to award nor does it constitute an offer of employment or a contract for services. Costs incurred in the submission of this proposal, or in making necessary studies or designs for the preparation thereof, are the sole responsibility of the Respondents. Further, no reimbursable cost may be incurred in the anticipation of award. Proposals containing elaborate artwork, expensive paper and binding and expensive visual or other presentations are neither necessary nor desired.
- 2.4 In an effort to maintain fairness in the process, all inquiries concerning this procurement are to be directed only to the County’s Purchasing Agent in writing. Attempts to contact any members of the County’s Commissioners’ Court or any other County employee to influence the procurement decision may lead to immediate elimination from further consideration.
- 2.5 When responding to this Proposal, follow all instructions carefully. Submit proposal contents according to the outline specified and submit all hard copy and electronic documents according to the instructions. Failure to follow these

instructions may be considered a non-responsive proposal and may result in immediate elimination from further consideration.

3.0 PROPOSAL CONTACT:

This Proposal is being issued by the County Purchasing Agent on behalf of Fort Bend County, Texas. Thus, responses should be directed to the Assistant Purchasing Agent, as outlined below. **Respondents are specifically directed NOT to contact any County personnel for meetings, conferences or technical discussions that are related to this Proposal other than specified herein. Unauthorized contact of any County personnel will likely be cause for rejection of the Respondent's proposal. All communications regarding the Proposal shall be directed to the County's Proposal Contact.** Communication with the Proposal Contact is permitted via email or written correspondence.

PROPOSAL CONTACT:

Cheryl Krejci, CPPB
Assistant County Purchasing Agent
Fort Bend County Travis Annex
301 Jackson, Suite 201
Richmond, Texas 77469
Cheryl.Krejci@fortbendcountytexas.gov

4.0 SUBMISSION REQUIREMENTS:

- 4.1 Submission requirements: one (1) original proposal, eight (8) paper copies, and one (1) electronic response on a labeled flash drive are required by RFP opening time of **2:00 PM on Tuesday, December 19, 2023**. Flash drive must contain only one (1) file in PDF format and must match written/original/paper response identically. Failure to provide proper original, flash drive or copies is cause for disqualification. Proposal shall be submitted to the address shown below. Proposal shall be signed by a person having the authority to bind the firm in a contract.

Fort Bend County	Proposal Number: R24-014
Purchasing Department	Due Date: Tuesday, December 19, 2023
301 Jackson, Suite 201	Time: 2:00 PM (CST)
Richmond, TX 77469	For: Insurance Broker of Record

- 4.2 Respondents may submit their proposal any time prior to the Opening Date and time after confirmation of addendum status. The Respondent's name and address as well as a distinct reference to the Proposal number above shall be marked clearly on the submission. All proposals are time-stamped upon receipt and are securely kept, unopened, until the Opening Date. No responsibility will attach to the County, or any official or employee thereof, for the pre-opening of, post-opening of, or the failure to open a proposal not properly addressed and identified. No oral, telegraphic, telephonic, emailed or facsimile proposals will be considered.

- 4.3 Proposals may be modified or withdrawn prior to the established opening date by delivering written notice to the proposal contact. Any alteration made prior to opening date and time shall be initialed by the signer of the proposal, guaranteeing authenticity.
- 4.4 Proposals time-stamped after the due date and time will not be considered and will be returned to the Respondent unopened. Regardless of the method used for delivery, respondents shall be wholly responsible for the timely delivery of submitted proposals.
- 4.5 The Respondent's name and address shall be clearly marked on all copies of the proposal.

5.0 INCURRED COSTS:

Those submitting proposals do so entirely at their expense. There is no expressed or implied obligation by the County to reimburse any individual or firm for any costs incurred in preparing or submitting proposals, for providing additional information when requested by the County or for participating in any selection interviews, including discovery (pre-contract negotiations) and contract negotiations.

6.0 ACCEPTANCE:

- 6.1 Submission of any proposal indicates a Respondent's acceptance of the conditions contained in this Proposal unless clearly and specifically noted otherwise in their proposal.
- 6.2 Furthermore, the County is not bound to accept a proposal on the basis of lowest price, and further, the County has the sole discretion and reserves the right to cancel this Proposal, to reject any and all proposals, to waive any and all informalities and or irregularities, or to re-advertise with either the identical or revised specifications, if it is deemed to be in the County's best interests. The County reserves the right to accept or reject any or all of the items in the proposal, and to award the contract in whole or in part and/or negotiate any or all items with individual Respondents if it is deemed in the County's best interest.
- 6.3 Although Fort Bend County desires to negotiate toward a contract with a selected Respondent, the Commissioners' Court may award the contract on the basis of the initial proposals received, without discussions. Therefore, each initial proposal should contain the Respondent's best terms.

7.0 INTERPRETATIONS, DISCREPANCIES, AND OMISSIONS:

- 7.1 It is incumbent upon each potential Respondent to carefully examine these specifications, terms, and conditions. Should any potential Respondent find discrepancies, omissions or ambiguities in this Proposal, the Respondent shall at

once request in writing an interpretation from the County's Proposal Contact. Any inquiries, suggestions, or requests concerning interpretation, clarification or additional information shall be made in writing via e-mail only to the County's Proposal Contact, as specified in Section 3.0. Deadline for submission of questions and/or clarification is no later than **Tuesday, December 5, 2023 at 10:00 AM. (central)**. Requests received after the deadline will not be responded to due to the time constraints of this Proposal process.

- 7.2 The issuance of a written addendum is the only official method by which interpretation, clarification or additional information will be given by the County. Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarification will be without legal effect. If it becomes necessary to revise or amend any part of this Proposal, notice will be given by the County Purchasing Agent to all prospective Respondents who were sent a Proposal. The Respondent in their proposal shall acknowledge receipts of amendments. Each Respondent shall ensure that they have received all addenda and amendments to this Proposal before submitting their proposals.

8.0 CONTRACTUAL OBLIGATIONS:

This Request for Proposal, response and associated documentation, any negotiations and final contract, when properly accepted by Fort Bend County, shall constitute a contract equally binding between the contractor and Fort Bend County.

9.0 RETENTION OF RESPONDENT'S MATERIAL:

The County reserves the right to retain all proposals regardless of which response is selected. All proposals and accompanying documents become the property of the County.

10.0 ASSIGNMENT:

The Respondent may not sell, assign, transfer or convey the contract resulting from this Proposal, in whole or in part, without the prior written approval from Fort Bend County Commissioners' Court.

11.0 CERTIFICATE OF INDEPENDENT PRICE DETERMINATION:

By submission of a proposal, each Respondent certifies, that in connection with this procurement:

- 11.1 The prices in this proposal have been arrived at independently, without consultation, communication, or agreement with any other Respondent; with any competitor; or with any County employee(s) or consultant(s) for the purpose of restricting competition on any matter relating to this Proposal.
- 11.2 Unless otherwise required by law, the prices which have been quoted in this proposal have not been knowingly disclosed by the Respondent and will not

knowingly be disclosed by the Respondent prior to award directly or indirectly to any other Respondent or to any competitor; and;

- 11.3 No attempt has been made or will be made by the Respondent to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

12.0 CONFIDENTIAL MATTERS:

- 12.1 All data and information gathered by the Respondent and its agents, including this Proposal and all reports, recommendations, specifications, and data shall be treated by the Respondent and its agents as confidential. The Respondent and its agents shall not disclose or communicate the aforesaid matters to a third party or use them in advertising, publicity, propaganda, and/or in another job or jobs, unless written consent is obtained from the County.
- 12.2 Proposals will only be publicly received and acknowledged only so as to avoid disclosure of the contents to competing Respondents and kept secret during negotiation. However, all proposals shall be open for public inspection after the contract is awarded. Trade secrets and any material that is considered to be confidential information contained in the proposal and identified by Respondent as such will be treated as confidential to the extent allowable in the Open Records Act.

13.0 LIMITS OF SUBCONTRACTORS:

- 13.1 The County has approval rights over the use and/or removal of all subcontractors and/or vendor(s). Subcontractors shall conform to all County policies.
- 13.2 Any dispute between the Respondent and subcontractors, including any payment dispute, will be promptly remedied by the Respondent. Failure to promptly remedy or to make prompt payment to subcontractor may result in the withholding of funds from the Respondent by the County for any payments owed to the subcontractor.

14.0 JURISDICTION, VENUE, CHOICE OF LAW:

This Proposal and any contract resulting there from shall be governed by and construed according to the laws of the State of Texas. Should any portion of any contract be in conflict with the laws of the State of Texas, the State laws shall invalidate only that portion. The remaining portion of the contract(s) shall remain in effect. Any lawsuit shall be governed by Texas law and Fort Bend County, Texas shall be the venue for any action or proceeding that may be brought or arise out of, in connection with or by reason of this Proposal process and resulting Agreements.

15.0 INDEPENDENT CONTRACTOR:

The Respondent is an independent contractor and no employee or agent of the Respondent shall be deemed for any reason to be an employee or agent of the County.

16.0 AMERICANS WITH DISABILITIES ACT (ADA)

Proposals shall comply with all federal, state, county, and local laws concerning this type of products/service/equipment/project and the fulfillment of all ADA requirements.

17.0 DRUG-FREE WORKPLACE:

All Respondents shall provide any and all notices as may be required under the Drug-Free Workplace Act of 1988, 28 CFR Part 67, Subpart F, to their employees and all sub-contractors to insure that the County maintains a drug-free workplace.

18.0 PERFORMANCE AND PAYMENT BOND:

No performance nor payment bond is required for this project.

19.0 POWER OF ATTORNEY:

An attorney-in-fact who signs a bid bond, performance bond or payment bond must file with each bond a certified and effectively dated copy of his or her power of attorney.

20.0 TEXAS ETHICS COMMISSION FORM 1295:

- 20.1 Effective January 1, 2016 all contracts executed by Commissioners Court, regardless of the dollar amount, will require completion of Form 1295 "Certificate of Interested Parties", per the new Government Code Statute §2252.908. All firms submitting a response to a formal Bid, RFP, SOQ or any contracts, contract amendments, renewals or change orders are required to complete the Form 1295 online through the State of Texas Ethics Commission website. Please visit:

<https://www.ethics.state.tx.us/File/>

- 20.2 On-line instructions:

20.2.1 Name of governmental entity is to read: Fort Bend County.

20.2.2 Identification number use: RFP 24-014.

20.2.3 Description is: Insurance Broker of Record.

- 20.3 Highest evaluated vendor will be required to provide the Form 1295 within three (3) calendar days from notification; however, if your company is publicly traded you are not required to complete this form.

21.0 INSURANCE:

- 21.1 All respondents shall submit, with RFP, a current certificate of insurance indicating coverage in the amounts stated below. In lieu of submitting a certificate of insurance, respondents may submit, with RFP, a notarized statement from an Insurance company, authorized to conduct business in the State of Texas, and acceptable to Fort Bend County, guaranteeing the issuance of an insurance policy, with the coverage stated below, to the firm named therein, if successful, upon award of this Contract.
- 21.2 At contract execution, contractor shall furnish County with properly executed certificates of insurance, which shall evidence all insurance required and provide that such insurance shall not be canceled, except on 30 days prior written notice to County. Contractor shall provide certified copies of insurance endorsements and/or policies if requested by County. Contractor shall maintain such insurance coverage from the time Services commence until Services are completed and provide replacement certificates, policies and/or endorsements for any such insurance expiring prior to completion of Services. Contractor shall obtain such insurance written on an Occurrence form (or a Claims Made form for Professional Liability insurance) from such companies having Best's rating of A/VII or better, licensed or approved to transact business in the State of Texas, and shall obtain such insurance of the following types and minimum limits:
- 21.2.1 Workers' Compensation insurance. Substitutes to genuine Workers' Compensation Insurance will not be allowed.
- 21.2.2 Employers' Liability insurance with limits of not less than \$1,000,000 per injury by accident, \$1,000,000 per injury by disease, and \$1,000,000 per bodily injury by disease.
- 21.2.3 Commercial general liability insurance with a limit of not less than \$1,000,000 each occurrence and \$2,000,000 in the annual aggregate. Policy shall cover liability for bodily injury, personal injury, and property damage and products/completed operations arising out of the business operations of the policyholder.
- 21.2.4 Professional Liability (Errors & Omissions) Insurance with limits of not less than \$1,000,000 each occurrence, \$2,000,000 aggregate. Such insurance will cover all Work performed by or on behalf of Contractor and its subcontractors under this Agreement. No Professional Liability policy written on an occurrence form will include a sunset or similar clause that limits coverage unless such clause provides coverage for at least twenty-four (24) months after the expiration or termination of this Agreement for any reason.

21.2.5 Errors and Omissions Professional Liability insurance with a limit of \$10,000,000.

- 21.3 County and the members of Commissioners Court shall be named as additional insured on a Primary and Non-Contributory basis to all required coverage except for Workers' Compensation and Professional Liability (Medical Malpractice) Insurance. All Liability policies including Workers' Compensation written on behalf of contractor, shall contain a waiver of subrogation in favor of County and members of Commissioners Court.
- 21.4 If required coverage is written on a claims-made basis, contractor warrants that any retroactive date applicable to coverage under the policy precedes the effective date of the contract; and that continuous coverage will be maintained or an extended discovery period will be exercised for a period of two (2) years beginning from the time that work under the agreement is completed.

22.0 INDEMNIFICATION:

Respondent shall save harmless County from and against all claims, liability, and expenses, including reasonable attorney's fees, arising from activities of Respondent, its agents, servants or employees, performed under this agreement that result from the negligent act, error, or omission of Respondent or any of Respondent's agents, servants or employees.

- 22.1 Respondent shall timely report all such matters to Fort Bend County and shall, upon the receipt of any such claim, demand, suit, action, proceeding, lien or judgment, not later than the fifteenth day of each month; provide Fort Bend County with a written report on each such matter, setting forth the status of each matter, the schedule or planned proceedings with respect to each matter and the cooperation or assistance, if any, of Fort Bend County required by Respondent in the defense of each matter.
- 22.2 Respondent's duty to defend, indemnify and hold Fort Bend County harmless shall be absolute. It shall not abate or end by reason of the expiration or termination of any contract unless otherwise agreed by Fort Bend County in writing. The provisions of this section shall survive the termination of the contract and shall remain in full force and effect with respect to all such matters no matter when they arise.
- 22.3 In the event of any dispute between the parties as to whether a claim, demand, suit, action, proceeding, lien or judgment appears to have been caused by or appears to have arisen out of or in connection with acts or omissions of Respondent, Respondent shall never-the-less fully defend such claim, demand, suit, action, proceeding, lien or judgment until and unless there is a determination by a court of competent jurisdiction that the acts and omissions of Respondent are not at issue in the matter.
- 22.4 Respondent's indemnification shall cover, and Respondent agrees to indemnify Fort

Bend County, in the event Fort Bend County is found to have been negligent for having selected Respondent to perform the work described in this request.

- 22.5 The provision by Respondent of insurance shall not limit the liability of Respondent under an agreement.
- 22.6 Respondent shall cause all trade contractors and any other contractor who may have a contract to perform construction or installation work in the area where work will be performed under this request, to agree to indemnify Fort Bend County and to hold it harmless from all claims for bodily injury and property damage that arise may from said Respondent's operations. Such provisions shall be in form satisfactory to Fort Bend County.
- 22.7 Loss Deduction Clause - Fort Bend County shall be exempt from, and in no way liable for, any sums of money which may represent a deductible in any insurance policy. The payment of deductibles shall be the sole responsibility of Respondent and/or trade contractor providing such insurance.

23.0 STATE LAW REQUIREMENTS FOR CONTRACTS:

The contents of this section are required by Texas Law and are included by County regardless of content.

- 23.1 Agreement to Not Boycott Israel Chapter 2271 Texas Government Code: Contractor verifies that if Contractor employs ten (10) or more full-time employees and this Agreement has a value of \$100,000 or more, Contractor does not boycott Israel and will not boycott Israel during the term of this Agreement.
- 23.2 Texas Government Code Section 2251.152 Acknowledgment: By signature on vendor form, Contractor represents pursuant to Section 2252.152 of the Texas Government Code, that Contractor is not listed on the website of the Comptroller of the State of Texas concerning the listing of companies that are identified under Section 806.051, Section 807.051 or Section 2253.153.

24.0 HUMAN TRAFFICKING:

By acceptance of this contract, Contractor acknowledges that Fort Bend County is opposed to human trafficking and that no County funds will be used in support of services or activities that violate human trafficking laws.

25.0 TENTATIVE SCHEDULE:

Release of RFP:	November 26, 2023
Deadline for Questions:	December 5, 2023
Submission Due Date:	December 19, 2023
Evaluation of Submissions:	Week of January 8, 2024

Commissioners Court Permission to Negotiate:	January 23, 2024
Negotiations:	Begin January 24, 2024
Final Contract Approval Commissioners Court:	February 27, 2024

26.0 PRE-RFP CONFERENCE:

There is no Pre-RFP meeting for this solicitation.

27.0 BACKGROUND:

The County has multiple lines of self-insurance/excess insurance coverage's as part of its' property and casualty program which include the following coverage lines: Property, Boiler and Machinery, General Liability, Sexual Abuse Liability, Auto Liability, Public Officials Liability, Errors and Omission, Employee Benefits Liability, Law Enforcement Liability, Crime, Worker's Compensation and Employers Liability, Medical Professional Liability, Pollution, Aviation and Cyber Risk. The Risk Management Department is responsible for administering the program for the County.

28.0 DETAILED SCOPE OF WORK:

The Broker shall provide the following services to the County:

- 28.1 Insurance placement; including insurance marketing, coverage analyses and policy binding. This may include the procurement of policies in addition to those mentioned in this RFP as needed.
- 28.2 Assist in the preparation of materials, statements of value, specifications and other underwriting data as required by insurers. This includes working with the County to gather, prepare and present the necessary information to the carriers.
- 28.3 Assist the County with proposal review, selection and negotiations with interested insurance carriers to obtain the most favorable rates, policy language and premiums available to the County.
- 28.4 Act upon the selected course of action/program and put forth into full force and effect without any lapse of coverage the necessary policies and coverage on behalf of the County and work with County personnel and the insurance company's personnel to ensure a smooth transition, when necessary.
- 28.5 Review all existing coverage's and make recommendations regarding any changes in coverage based on such things as unintentional self-insurance, gaps in coverage, restrictive limits, and cost of coverage.
- 28.6 Issue insurance documents such as certificates and binders as required by the County.
- 28.7 Consult with the County Director of Risk Management regarding the effectiveness

of the program, review proposed changes and new coverage in anticipation of the next year's insurance program, including but not limited, to the evaluation of alternative insurance and/or risk financial proposals.

- 28.8 Advise the County Director of Risk Management on questions of insurance both as to coverage for the County itself and as to insurance to be obtained from various contractors and agencies doing business with/for the County.
- 28.9 Advise the County Director of Risk Management whenever new coverage's become available and consult with the County Director of Risk Management on the advisability of obtaining such coverage.
- 28.10 Research technical exposure and coverage questions.
- 28.11 Review insurance policies for appropriate coverage, provisions and conditions, exclusions and endorsements.
- 28.12 Verify the accuracy and adequacy of all binders, policies, policy endorsements, carrier invoices, and other insurance-related documents prior to delivery.
- 28.13 Order and process change endorsements.
- 28.14 All coverage written shall be received net of commissions.
- 28.15 Bill and process insurance invoices.
- 28.16 Coordinate Carrier value-added services such as loss control inspections.
- 28.17 Make risk identification, analysis, and reduction recommendations.
- 28.18 Establish and maintain, with the cooperation of County personnel, an up-to-date listing of all real and personal property owned and/or leased by the County and intended to be covered under any policies of insurance.
- 28.19 Assist County's risk management with large loss reporting and resolution of large losses and catastrophic claims. Participate and advise in quarterly claims meetings. Serve as consultant to the County with resolving Carrier issues.
- 28.20 Consultative assistance with Special Projects such as cost allocation, benchmarking and loss control accountability/incentive programs

29.0 EVALUATION CRITERIA:

In order to facilitate the analysis of responses to this Proposal, Respondents are required to prepare their proposals in accordance with the instructions outlined in this part. Proposals should be prepared as simply as possible and provide a straightforward, concise description of the

Respondent's capabilities to satisfy the requirements of the Proposal. Emphasis should be concentrated on accuracy, completeness, and clarity of content. All parts, pages, figures, and tables are required to be numbered and clearly labeled and tabbed for finding information quickly and easily. Font size below 10 point is prohibited.

- 29.1 Respondents are required to follow the outline below when preparing their proposals:

Tab	Title Page
	Table of Contents
	Executive Summary
1	Qualifications of the Brokerage Firm
2	Brokerage Team
3	Innovation and Effectiveness
4	Proposed Pricing/Costs/Fees
5	Required forms and overall completeness of submission

- 29.2 Any exceptions to the Proposal requirements shall be identified in the applicable section.

- 29.3 Executive Summary - This section should be limited to a brief narrative highlighting the company's background and experience. Narrative should clearly demonstrate compliance with Respondent qualifications listed in the RFP specifications. Include length of time the company has been in business and provide examples of past and current projects. Note that the executive summary is to identify the primary contacts for the Respondent.

- 29.4 Respondents will be evaluated utilizing the factors, as weighted below:

Tab 1 Qualifications of the Brokerage Firm (weight factor = 40%)

- Describe the brokerage firm's qualifications and resources available to provide the services listed above. Such description shall include, but not be limited to, responses to the following:
 - 1. Identify the length of time the brokerage firm has been operating, and has operated within the Texas Public Sector Community.
 - 2. Identify the brokerage firm's location, size, and presence, including:
 - a. The address of the brokerage firm's office that will handle the County's account.
 - b. The size of the staff at such office.

- c. Number of clients that the brokerage firm presently serves.
 - d. The premium volume the brokerage firm produces annually and how much of that premium volume is from public entities.
- 3. Describe any experience and special expertise your brokerage firm has in providing the desired insurance coverage's and risk management consultation services to local governmental entities, especially those in Texas.
- 4. Describe the insurance markets that the brokerage firm can access. Specify which of these insurance companies are most responsive to government needs.
- 5. Provide information documenting your brokerage firm's ability to assist the County in proving and resolving difficult claims with insurers.
- 6. Provide a statement of whether the brokerage firm will agree to disclose all compensation it receives as a result of contracts placed on behalf of County and, if not, an explanation of why it will not provide such information.
- 7. Indicate whether the brokerage firm provides full risk identification and analysis as part of broker's normal contracted services.
- 8. Describe what the brokerage firm will do to assure that proper attention will be given to the County's account now and as its book of business grows.
- 9. Describe any and all products offered that are unique to the firm such as risk management information systems, loss control programs, actuarial services, etc. Provide a brief description of Proposer's firm, and the scope and nature of services routinely provided by Proposer. Demonstrate the ability to perform the required services as described in this RFP. Indicate Proposer's understanding of the purpose and scope of the proposed services as evidenced by the quality of the proposal submitted. Identify the type of business (corporation, partnership, sole proprietor, etc.) under which Proposer's firm operates, date business started, and license number to do business in the State of Texas.

Tab 2 Brokerage Team (weight factor = 15%)

- Provide an organizational chart showing the level of organizational responsibility and the services provided by each of the members of your firm's proposed service team. Include resumes of those principals, partners and other key service staff members who will be directly involved in the overall brokering and consulting effort. Resumes and organizational charts will be considered as "public information" please do not include any personal information that the person(s) do not want to be considered as "public information".
- By listing the individuals in the proposal, the firm is making a commitment that, barring unforeseen circumstances, they are the personnel who will be assigned to the program. Any changes to the personnel indicated must be approved by the County. The County reserves the right to request a substitution of personnel.

Tab 3 Innovation and Effectiveness (weight factor = 10%)

- Describe proposer's understanding, responsiveness and approach to the insurance brokerage and consultative services required. Also include descriptions of:
 1. Any broker service innovations proposer is proposing.
 2. The effectiveness of the proposed broker services and how such effectiveness is measured.
 3. Any unique services or special expertise your brokerage firm offers that might bring value and/or efficiency to the County.

Tab 4 Proposed Pricing/Costs/Fees (weight factor = 30%)

- The fee-based proposal shall set forth a flat annual fee to provide all the Standard Services without collecting a commission from any insurance companies or, if commissions or contingent type fees are required by the insurance companies, returning such commission or fees to the County.
- The service fee portion of your proposal must identify any other charges that would, or could, be billed in connection with the insurance brokerage and consulting services to be provided.

Tab 5 Required forms and overall completeness of submission (weight factor = 5%)

- Proof of Insurance as required herein
- Completed Respondent forms
- Completed W9 form
- Completed Tax Debt form

30.0 TERM OF CONTRACT:

The term of this contract is for a period of twenty-four (24) months, commencing on or near **April 1, 2024 through March 31, 2026**, with three (3) additional one-year renewal options under the same terms and conditions if mutually agreeable to both parties. Either party for any reason may terminate this contract by giving thirty (30) days written notice of the intent to terminate.

31.0 AWARD:

RFP will be evaluated by a committee comprised of County staff. The committee will review proposal/s submitted and may develop a short list of not more than four (4) firms. These firms may be requested to submit additional information and/or may be invited for an interview, if needed, with the Committee. Based on further review after the interviews, the committee will forward their recommendations to the Fort Bend County Commissioners Court.

32.0 VENDOR STATUS:

The awarded vendor is required to hold an **active** status on the SAM.gov website, if applicable, <https://sam.gov/content/home>, and with the Texas Comptroller Taxable Entity website <https://mycpa.cpa.state.tx.us/coa/>.

33.0 REQUIRED FORMS:

All respondents submitting are required to complete the attached/included and return with submission:

- 33.1 Vendor Form
- 33.2 W9 Form
- 33.3 Tax Form/Debt/Residence Certification
- 33.4 Proof of Insurance

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

Print or type See Specific Instructions on page 2.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification; check only one of the following seven boxes: ☐ Individual/sole proprietor or single-member LLC ☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. ☐ Other (see instructions) ▶ _____	
	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>	
	5 Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
	6 City, state, and ZIP code	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Social security number								
				-				
or								
Employer identification number								
				-				

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here	Signature of U.S. person ▶	Date ▶
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/fw9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)

- Form 1099-C (canceled debt)

- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding?* on page 2.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.

Note. If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States:

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Publication 515, Withholding of Tax on Nonresident Aliens and Foreign Entities).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items:

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 28% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the Part II instructions on page 3 for details),

3. The IRS tells the requester that you furnished an incorrect TIN,

4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or

5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code* on page 3 and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships* above.

What is FATCA reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code* on page 3 and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account, list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note. ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C Corporation, or S Corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box in line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box in line 3.

Limited Liability Company (LLC). If the name on line 1 is an LLC treated as a partnership for U.S. federal tax purposes, check the "Limited Liability Company" box and enter "P" in the space provided. If the LLC has filed Form 8832 or 2553 to be taxed as a corporation, check the "Limited Liability Company" box and in the space provided enter "C" for C corporation or "S" for S corporation. If it is a single-member LLC that is a disregarded entity, do not check the "Limited Liability Company" box; instead check the first box in line 3 "Individual/sole proprietor or single-member LLC."

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space in line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5 ²
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

¹ See Form 1099-MISC, Miscellaneous Income, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note. You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN. However, the IRS prefers that you use your SSN.

If you are a single-member LLC that is disregarded as an entity separate from its owner (see *Limited Liability Company (LLC)* on this page), enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note. See the chart on page 4 for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.ssa.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/businesses and clicking on Employer Identification Number (EIN) under Starting a Business. You can get Forms W-7 and SS-4 from the IRS by visiting IRS.gov or by calling 1-800-TAX-FORM (1-800-829-3676).

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note. Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if items 1, 4, or 5 below indicate otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code* earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account)	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Custodian account of a minor (Uniform Gift to Minors Act)	The minor ²
4. a. The usual revocable savings trust (grantor is also trustee) b. So-called trust account that is not a legal or valid trust under state law	The grantor-trustee ¹ The actual owner ¹
5. Sole proprietorship or disregarded entity owned by an individual	The owner ³
6. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor ⁴
For this type of account:	Give name and EIN of:
7. Disregarded entity not owned by an individual	The owner
8. A valid trust, estate, or pension trust	Legal entity ⁴
9. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
10. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
11. Partnership or multi-member LLC	The partnership
12. A broker or registered nominee	The broker or nominee
13. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
14. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships* on page 2.

*Note. Grantor also must provide a Form W-9 to trustee of trust.

Note. If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records from Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Publication 4535, Identity Theft Prevention and Victim Assistance.

Victims of identity theft who are experiencing economic harm or a system problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at: spam@uce.gov or contact them at www.ftc.gov/idtheft or 1-877-IDTHEFT (1-877-438-4338).

Visit IRS.gov to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

Job No.: _____

TAX FORM/DEBT/RESIDENCE CERTIFICATION
(for Advertised Projects)

Taxpayer Identification Number (T.I.N.): _____

Company Name submitting Bid/Proposal: _____

Mailing Address: _____

Are you registered to do business in the State of Texas? Yes No

If you are an individual, list the names and addresses of any partnership of which you are a general partner or any assumed name(s) under which you operate your business

- I. **Property:** List all taxable property in Fort Bend County owned by you or above partnerships as well as any d/b/a names. Include real and personal property as well as mineral interest accounts. (Use a second sheet of paper if necessary.)

Fort Bend County Tax Acct. No.*

Property address or location**

_____	_____
_____	_____
_____	_____
_____	_____

* *This is the property account identification number assigned by the Fort Bend County Appraisal District.*

** *For real property, specify the property address or legal description. For business personal property, specify the address where the property is located. For example, office equipment will normally be at your office, but inventory may be stored at a warehouse or other location.*

- II. **Fort Bend County Debt** - Do you owe any debts to Fort Bend County (taxes on properties listed in I above, tickets, fines, tolls, court judgments, etc.)?

Yes No If yes, attach a separate page explaining the debt.

- III. **Residence Certification** - Pursuant to Texas Government Code §2252.001 *et seq.*, as amended, Fort Bend County requests Residence Certification. §2252.001 *et seq.* of the Government Code provides some restrictions on the awarding of governmental contracts; pertinent provisions of §2252.001 are stated below:

(3) "Nonresident bidder" refers to a person who is not a resident.

(4) "Resident bidder" refers to a person whose principal place of business is in this state, including a contractor whose ultimate parent company or majority owner has its principal place of business in this state.

I certify that _____ is a Resident Bidder of Texas as defined in Government Code
[Company Name]
§2252.001.

I certify that _____ is a Nonresident Bidder as defined in Government Code
[Company Name]
§2252.001 and our principal place of business is _____
[City and State]

EXHIBIT B

Contractor's Proposal for Insurance Broker of Record RFP 24-014



Proposal for

Insurance Broker of Record RFP 24-014

December 19, 2023



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December 19, 2023

Fort Bend County
Purchasing Department
Travis Annex
301 Jackson, Suite 201
Richmond, TX 77469



Attention: Cheryl Krejci, CPPB, Assistant County Purchasing Agent

Reference: Insurance Broker of Record RFP 24-014

Dear Ms. Krejci,

McGriff is pleased to have the opportunity to participate in the Fort Bend County Broker Services RFP. Our intent throughout this proposal is to provide an accessible format to address the specific items within the RFP specifications and to further support that McGriff has the people, experience, resources, talent and capabilities to add considerable value in the placement and service of Fort Bend County's Property and Casualty Insurance Program.

We believe we are uniquely qualified to provide the best overall value to Fort Bend County for the following reasons:

Texas Public Entity Experience: McGriff provides insurance and risk management services for more Texas Public Entities than any of our peers. We currently serve 9 of the 13 most populous Counties in the State. No other firm can match our large Texas County experience and expertise.

Marketing Leverage: With combined premium volume of approximately \$13 Billion, McGriff has considerable leverage in the insurance marketplace. Specifically, our Houston offices place more Public Entity premium into the marketplace than any of our competitors, which yields significant market leverage with key underwriters. We are able to utilize this market leverage to secure the most competitive terms for Fort Bend County.

Local Resources: Fort Bend County will be serviced out of our Houston office, which consists of over 250 insurance professionals. All of the broking, claim management and day to day service will remain out of Houston. Our team is always available to provide immediate response. We also maintain a fully staffed Claims Management, Loss Prevention and Risk Analytics teams in our Houston office that will bring considerable value to Fort Bend County.

No Learning Curve: Fort Bend County possesses a very unique culture and risk profile. Having served Fort Bend County for the last several years coupled with our Texas County expertise, we understand your risk perils, operations and how to design an insurance program to fit your unique needs.

McGriff is committed and well suited to perform the implementation of the work within the project schedule. Joe Blasi and Ben Odom will be the main point of contacts for Fort Bend County. Both Joe and Ben have the authority to execute and bind this proposal/contract with Fort Bend County.

Sincerely,

McGriff Insurance Services, LLC.

Joseph R. Blasi
Executive Vice President

Ben Odom
Senior Vice President

Tab 1 Qualifications of the Brokerage Firm

Describe the brokerage firm's qualifications and resources available to provide the services listed above. Such description shall include, but not be limited to, responses to the following:

1. Identify the length of time the brokerage firm has been operating, and has operated within the Texas Public Sector Community.

McGriff Insurance Services, LLC. (McGriff) was founded in 1922; our name dates back to 1886. McGriff is the retail brokerage subsidiary of Truist Insurance Holdings, LLC (TIH), the 5th largest insurance brokerage in the U.S. We offer a full array of brokerage and risk management product services. We have been providing these services to the Texas Public Sector community for over 35 years.

2. Identify the brokerage firm's location, size, and presence, including:
 - a. The address of the brokerage firm's office that will handle the County's account.

All work performed on behalf of Fort Bend County will be out of our Houston office, located at 10100 Katy Freeway, Suite 400, Houston, Texas 77043.

- b. The size of the staff at such office.

The McGriff Houston office has approximately 250 employees consisting of client representatives, brokers, account service representatives, loss control professionals, licensed adjusters, and analytics professionals. Our local Houston office has over 50 professionals that focus on serving our Texas Public Entity clients. On a national scale, McGriff has over 3,500 employees.

- c. Number of clients that the brokerage firm presently serves.

McGriff is the leading provider of Risk Management and Insurance Services for Texas Public Entities serving in excess of 150 Texas Entities. McGriff currently serves 9 of the 13 most populous counties in the State as well as the City of Houston, Fort Bend ISD, Lamar CISD, Port of Houston and Houston Community College System. McGriff is a leader in the Texas County marketplace servicing more counties than any other Brokerage firm. We have approximately 10,000 Property and Casualty clients.

- d. The premium volume the brokerage firm produces annually and how much of that premium volume is from public entities.

McGriff places over \$13 billion in annual premiums into the insurance marketplace. We place over \$1 Billion into the Public Entity Insurance marketplace.



5th Largest*
Independent Insurance Broker



\$1.1 Billion
2022 Revenue



\$11.6 Billion
2022 Premium Volume



3,500+
Teammates



160
Countries represented
through global partnerships

*Truist Insurance Holdings, LLC
Source: Business Insurance, July 2023



3. Describe any experience and special expertise your brokerage firm has in providing the desired insurance coverages and risk management consultation services to local governmental entities, especially those in Texas.

McGriff Texas' experience and expertise in serving Texas Public Entities is unmatched by any other broker provider. McGriff provides Risk Management/Insurance services to more Texas Counties than any other brokerage firm, serving 7 of the 10 most populous counties and 9 of the 13 most populous counties in the State. Below is a small sample of the governmental entities we currently service:

National & Local Public Entity Experience

Bexar County · Brooks Development Authority · Brownsville Public Utilities · City of Arlington · City of Bryan · City of College Station · City of Dallas · City of Denton · City of Garland · City of Grand Prairie · City of Greenville · City of Houston · City of Irving · City of Lewisville · City of McKinney · City of McAllen · City of Miami Beach · City of New Orleans · City of North Richland Hills · City of Tampa · Collin County · Dallas County · Dallas County Community College District · Denton County Transportation Authority · Denton Energy Center · Ector County Independent School District · El Paso County · Garland Independent School District · Greater New Orleans Expressway Authority · Harlandale Independent School District · Harris County · Hidalgo County · Jefferson County · Lafayette Airport · Leon County School Board · Mesquite Independent School District · New Orleans Aviation Board · Non-Flood Asset Protection Management Authority · North East Independent School District · Northside Education Foundation · Northside Independent School District · Plano Independent School District · Port of Houston Authority · Port of San Antonio · Richardson Independent School District · San Antonio Independent School District · St. Tammany Parish Government · San Antonio Housing Authority · San Antonio Early Childhood MDC · San Patricio County · Somerset Independent School District · Southwest Preparatory School · Tarrant County College District · Tarrant County · Terrebonne Parish · Texas Municipal Power Agency · Texas Political Subdivisions · Texas State Aquarium Association · Via Metropolitan Transit Authority

KEY INSURANCE COVERAGES FOR FT. BEND COUNTY

- Property
- Liability
- Builders Risk
- Professional Liability
- Auto/Fleet
- Crime
- Boiler & Machinery
- Wind/Flood
- Cyber
- Workers' Compensation
- Pollution
- Aviation



Fort Bend County's service team will be led by Joe Blasi and Ben Odom.

Joe has been providing Risk Management & Brokerage services to local Public Entities for over 25 years. Joe holds his Chartered Property Casualty Underwriter designation and Associate in Risk Management designation. Some notable long term clients consist of: Harris County, Lamar Consolidated ISD, Fort Bend ISD and City of Houston.

Ben Odom is a Fort Bend County native and continues to call Fort Bend County his home today. Ben received his BBA in Risk Management & Insurance and started his career as an underwriter for Travelers Insurance in its Public Entity Division. Ben's underwriting experience has proven to be valuable time and time again for his clients as he understands the underwriting process, account rating, how to navigate the internal waters of an insurance carrier in order to achieve target pricing or expedite a claim payment and has several strong relationships with former co-workers at the major Texas Public Entity carriers. Some notable clients consist of: Travis County, Williamson County, Liberty County, Smith County, Dallas County, Collin County & San Patricio County.

Our Texas County experience, large claims team, risk analytics services, and strong underwriting relationships will be of value to Fort Bend County. We are familiar with the exposures faced by Fort Bend County and surrounding counties. Because every county has special needs all of their own, we search the global marketplace to find the right fit.

Our partners include long-standing, senior level relationships with underwriters that serve public entities, third party administrators, restoration contractors and legal defense firms. Your access to all properly credentialed carriers and vendors will be enhanced by our familiarity with these companies and our knowledge of their performance for other large Texas Counties/Public Entities.

McGriff is committed to providing the services for each line of insurance/reinsurance coverages as set forth in the Property and Casualty program for Fort Bend County.

Why McGriff for Fort Bend County?

- Local service team familiar with the County operations
- Billion-dollar annual Property Insurance premium volume
- Property Insurance advisor for several hundred Texas Public Entities
- Access to new and untapped markets for Windstorm, Flood, Cyber and other difficult exposures
- Experts in Alternative Risk Transfer products
- Ability to solve complex claims issues
- Strength of corporate balance sheet
- FEMA claims preparation expertise
- Disaster Management suite of services



4. Describe the insurance markets that the brokerage firm can access. Specify which of these insurance companies are most responsive to government needs.

McGriff has access to all carriers that specialize in Texas County insurance programs, some of which are McGriff proprietary/exclusive relationships. We have provided a list of our carrier network on the following pages.

The list below is a sample of carriers that specialize in Texas County Insurance that we'd expect to be extremely competitive on Fort Bend County's Property & Casualty Insurance program:

Texas County Insurance Carriers	
• Lloyds	• XL
• Brit	• Zurich
• Lexington	• Travelers
• Swiss Re	• Liberty
• AmRisc / Chronos	• One Beacon
• Chubb / Westchester	• Trident
• Axis	• Colony
• Velocity	• Safety National
• Endurance	• Midwest Employers
• Argo	• Berkshire
• RSUI	• Gemini
• Arch	• Great American
• Markel	• CNA
• CV Starr	• AIG
• Hartford	• Old Republic
• Wright	• TPS

AVAILABLE CARRIERS

Name	Name	Name	Name
* HARTFORD BULK REPORT	+CERTAIN INS. COMPANIES	AIG COMMERCIAL INSURANCE	AMBRIDGE PARTNERS LLC
*AMERICAN STATES INS GROUP	+LLOYDS OF LONDON	AIG ENERGY, INC.	AMCO INSURANCE COMPANY
*CHUBB & SON, INC.	+MAX RE EUROPE LIMITED	AIG ENVIRONMENTAL	AMERICA FIRST INSURANCE CO
*CHUBB & SON, INC. (CA)	+OIL CASUALTY INSURANCE LTD	AIG EXCESS LIABILITY INS INT'L	AMERICA FIRST LLOYDS INSURANCE
*CHUBB GROUP	+XL INSURANCE (BERMUDA) LTD.	AIG EXCESS LIABILITY INSURANCE	AMERICAN ALTERNATIVE INS CORP
*CIGNA INTERNATIONAL	5 STAR SPECIALTY PROGRAMS	AIG GLOBAL MARINE	AMERICAN ALTERNATIVE INS. CORP
*CNA	A C NEWMAN & COMPANY	AIG INDEMNITY INS. CO.	AMERICAN APPRAISAL ASSOC. INC
*CNA INS CO - DIRECT PAY/A/C	A G ADMINISTRATORS	AIG LIFE INSURANCE COMPANY	AMERICAN AUTOMOBILE INS CO
*CNA INSURANCE CO. #360071639	A I G OIL RIG	AIG OIL RIG	AMERICAN BANKERS INS CO OF FL
*CNA INSURANCE CO. #380-032055	A I SPECIALTY LINES INS CO	AIG PREMIER INSURANCE COMPANY	AMERICAN CAS. CO. OF READING, PA
*CNA INSURANCE CO. #770-073229	A. I. GLOBAL	AIG PRIVATE CLIENT GROUP	AMERICAN CASUALTY COMPANY OF
*CNA INSURANCE COMPANIES	AB RISK SPECIALIST INC.	AIG PRIVATE CLIENT GRP-DIRECT	AMERICAN CENTRAL INS. CO.
*COMMERCIAL UNION INSURANCE	ACADIA INSURANCE COMPANY	AIG WORLDSOURCE/CO AMERICAN	AMERICAN COASTAL INS. COMPANY
*CONTINENTAL CASUALTY COMPANY	ACCEPTANCE CASUALTY INS CO	AIGRM SPECIAL BUSINESS	AMERICAN CONTEMPORARY INS. CO.
*CONTINENTAL INSURANCE COMPANY	ACCIDENT INSURANCE COMPANY INC	AIU INSURANCE COMPANY	AMERICAN CONTINENTAL INSURANCE
*CRUM & FORSTER INSURANCE CO	ACCREDITED SURETY & CASUALTY	AIU NO AMERICAN, INC.	AMERICAN CONTRACT. INS GRP LTD
*CRUM-FORSTER INSURANCE, CO.	ACE (PROGRAMS DIRECT BILL)	AIU NORTH AMERICAN, INC	AMERICAN CONTRACTORS INDEMN CO.
*DEPT. OF COMMERCE & CONSUMER	ACE AMER. F&M INS CO OF KOREA	AIX SPECIALTY INSURANCE CO	AMERICAN CONTRACTORS INS RRG
*FIREMAN'S FUND - SR5	ACE AMERICAN INS CO-GENIUS	AJ GALLAGHER THE STORAGE FIRST	AMERICAN CONTRACTORS INS. GRP.
*FIREMAN'S FUND COUNTY MUTUAL	ACE AMERICAN INSURANCE CO	AJ GALLAGHER (AL HOME BLD ONLY)	AMERICAN CREDIT INDEMNITY
*FIREMAN'S FUND INS CO	ACE AMERICAN INSURANCE CO.	AL CHARK INSURANCE CO (EGYPT)	AMERICAN DYNASTY
*FIREMAN'S FUND INS CO	ACE BERMUDA INSURANCE LTD	ALABAMA MUNICIPAL INS CORP	AMERICAN E&S INSURANCE BROKERS
*FIREMAN'S FUND INS. CO. OF GA	ACE EUROPEAN GROUP LIMITED	ALABAMA PUBLIC AUTO INS AGY	AMERICAN ECONOMY INS CO
*FIREMAN'S FUND INSURANCE CO	ACE FIRE UNDERWRITERS INS CO	ALA COMP (BENEFIT CHOICES INC)	AMERICAN EMPIRE INSURANCE
*FIREMAN'S FUND INSURANCE CO.	ACE INA INSURANCE	ALASKA NATIONAL INSURANCE CO	AMERICAN EMPIRE SURPLUS LINES
*FIREMAN'S FUND INSURANCE CO.	ACE INSURANCE CO.(PUERTO RICO)	ALBANY INSURANCE COMPANY	AMERICAN EMPLOYERS' INSURANCE
*FIREMAN'S FUND PROD #01490045	ACE INSURANCE S.A. - N.V.	ALEA LONDON LIMITED	AMERICAN EQUITY INSURANCE CO
*FLORIDA DEPARTMENT OF	ACE INSURANCE S.A. - N.V.	ALEA NORTH AMERICA INS CO	AMERICAN EQUITY SPECIALTY INS
*GREAT AMERICAN INSURANCE CO	ACE LIMITED	ALESCO RISK MANAGEMENT SERVICE	AMERICAN EQUITY UNDERWRITERS
*GROUP HEALTH COOPERATIVE	ACE PROPERTY & CASUALTY	ALEXANDER & BROWN INS SRVC INC	AMERICAN FAMILY LIFE ASSURANCE
*HANOVER INSURANCE COMPANY	ACE SEGUROS, S.A.	ALEXANDER MORFORD & WOO (CA)	AMERICAN FAMILY LIFE INSURANCE
*HARLEYSVILLE INSURANCE	ACIG INC.	ALL RISKS LTD.	AMERICAN FEDERATED INS CO
*HARLEYSVILLE MUTUAL INS CO	ACIG INSURANCE COMPANY	ALLEGHANY INSURANCE	AMERICAN FIDELITY ASSURANCE CO
*HARTFORD BOND DEPARTMENT	ACSTAR INSURANCE COMPANY	ALLEGHENY SURETY AGENCY INC	AMERICAN FIRE AND CASUALTY CO
*HARTFORD CASUALTY INS COMPANY	ACUTITY A MUTUAL INS CO	ALLEGANT MGMT SERVICES INC	AMERICAN GENERAL LIFE INS CO
*HARTFORD INSURANCE COMPANY	ADMIRAL INSURANCE COMPANY	ALLENDALE MUTUAL INSURANCE CO	AMERICAN GLOBAL INSURANCE CO
*INTERNATIONAL FIDELITY INS CO	ADRIATIC INSURANCE COMPANY	ALLIANT INSURANCE SERVICES	AMERICAN GUARANTEE & LIABILITY
*INTERNATIONAL MARINE UNDERWRTS	ADROIT MUTUAL BENEFITS LLC	ALLIANZ AUSTRALIA INS. LIMITED	AMERICAN HERITAGE LIFE INS CO
*MARINE OFFICE OF AMERICA	ADVANCED INS COVERAGES INC	ALLIANZ AVIATION MANAGERS LLC	AMERICAN HOME ASSURANCE CO
*MARINE OFFICE OF AMERICA, INC.	AEGIS INSURANCE SERVICES LTD	ALLIANZ GLOBAL CORP & SPEC	AMERICAN INSURANCE COMPANY
*MARYLAND CASUALTY COMPANY	AEGIS INSURANCE SERVICES, LTD.	ALLIANZ GLOBAL RISKS US INS CO	AMERICAN INTERNAT SPECIALTY
*Mississippi Dept. of Ins	AEGIS JANSON GREEN INS SERVICE	ALLIANZ LIFE INS CO OF NO AM	AMERICAN INTERNATIONAL
*NATIONWIDE AGRIBUSINESS INS	AEGIS SECURITY INS. CO.	ALLIANZ UNDERWRITERS INS. CO.	AMERICAN INTERNATIONAL CO
*NEW HAMPSHIRE INS CO	AEGIS SYNDICATE 1225	ALLIED BENEFITS SYSTEMS, INC.	AMERICAN INTERNATIONAL GROUP
*PENN NATIONAL INS. CO.	AETNA LIFE INSURANCE COMPANY	ALLIED P&C INSURANCE CO.	AMERICAN INTERNATIONAL INS.
*PMA INSURANCE GROUP	AETNA US HEALTHCARE INC.	ALLIED UNDERWRITING INC.	AMERICAN INTERNATIONAL INS. CO
*PMA REINSURANCE COMPANY	AETNA US HEALTHCARE OF N.TX.	ALLIED WORLD ASSUR CO EUROPE	AMERICAN INTERNATIONAL PACIFIC
*RELIAANCE INS. CO	AFFILIATED FM INSURANCE	ALLIED WORLD ASSURANCE CO (US)	AMERICAN INTERNATIONAL UNION
*ROYAL & SUN ALLIANCE	AFFILIATED FM INSURANCE CO.	ALLIED WORLD ASSURANCE CO LTD	AMERICAN INTERNAT'L GROUP (CA)
*ST PAUL TRAVELERS (PORTLAND)	AFFINITY INS. SERVICES INC.	ALLIED WORLD NATIONAL	AMERICAN INTERSTATE INS CO.
*ST. PAUL FIRE & MARINE INS.	AFFINITY INSURANCE SERV., INC.	ALLIED WORLD REINSURANCE CO	AMERICAN INT'L CO TEXAS
*ST. PAUL TRAVELERS	AFFINITY PROGRAMS	ALLMERICA FINANCIAL BEN INS CO	AMERICAN INT'L SOUTH INS CO
*TEXAS STAMPING FEE	AFIANZADORA INSURGENTES S.A.	ALLSTAR FINANCIAL GROUP, INC.	AMERICAN INT'L SOUTH INS. CO.
*TEXAS STAMPING FEE (AL)	AGCS MARINE INSURANCE COMPANY	ALLSTAR SURETY COMPANY, INC.	AMERICAN INT'L UNDERWRITERS
*TRAVELERS	AGF BRASIL SEGUROS S.A.	ALLSTATE COUNTY MUTUAL INS CO.	AMERICAN LIFE & GENERAL INS CO
*WAUSAU INSURANCE CO	AGRITRUST OF GEORGIA	Allstate Fire & Casualty Co	AMERICAN LIFE INS CO
*WAUSAU INSURANCE CO.	AJ RISK SPECIALISTS INS., INC.	ALLSTATE INDEMNITY COMPANY	AMERICAN LIFE INS CO LTD/KENYA
*WAUSAU INSURANCE COMPANY	AJ RISK SPECIALISTS OF MO INC.	ALLSTATE INS CO - DIRECT BILL	AMERICAN LUMBER UNDERWRITERS
*WESTFIELD COMPANIES	AIG	ALLSTATE INS GROUP-DIRECT BILL	AMERICAN MANAGEMENT CORP
*ZURICH AMER. INS. CO BENEFITS	AIG ADVANTAGE INSURANCE CO.	ALTERRA AMERICA INSURANCE CO	AMERICAN MINING INSURANCE CO.
*ZURICH AMERICAN INS COMPANY	AIG AGENCY AUTO	ALTERRA EXCESS & SURPLUS	AMERICAN MODERN HOME INSURANCE
*ZURICH INSURANCE COMPANY	AIG AVIATION, INC.	ALTERRA EXCESS AND SURPLUS	AMERICAN MOTORISTS INS. CO.
+ACCEPTANCE INDEMNITY INS CO	AIG AVIATION INC. (TEXAS)	ALTERRA SPECIALTY INSURANCE	AMERICAN NATIONAL FIRE INS CO
+ACE INSURANCE COMPANY, LTD.	AIG CASUALTY COMPANY	AM GUARD INSURANCE COMPANY	AMERICAN NATIONAL INSURANCE CO
+ALLIED WORLD ASSURANCE US, INC	AIG CENTENNIAL INSURANCE CO.	AM INSURANCE	AMERICAN NAT'L GENERAL INS CO.

AVAILABLE CARRIERS (CONT.)

Name	Name	Name	Name
AMERICAN RELIABLE INS	ARCH INSURANCE COMPANY (EUROPE	AXIS REINSURANCE COMPANY	BLUE CROSS BLUE SHIELD OF OR
AMERICAN RISK FUNDING INS. CO.	ARCH INSURANCE COMPANY(SURETY)	AXIS SPECIALTY EUROPE LIMITED	BLUE CROSS BLUE SHIELD OF SC
AMERICAN SAFETY CASUALTY INS	ARCH REINSURANCE COMPANY	AXIS SPECIALTY INS. CO.	BLUE CROSS BLUE SHIELD OF TN
AMERICAN SAFETY INDEMNITY CO.	ARCH REINSURANCE LTD	AXIS SPECIALTY INSURANCE CO.	BLUE CROSS BLUE SHIELD OF TX
AMERICAN SAFETY INSURANCE CO	ARCH SPECIALTY INS. CO.	AXIS SPECIALTY LIMITED	BLUE CROSS BLUE SHIELD OF UTAH
AMERICAN SAFETY RRG, INC.	ARCH SPECIALTY INSURANCE CO.	AXIS SURPLUS INSURANCE CO.	BLUE SHIELD OF CALIFORNIA
AMERICAN SECRETARY INSURANCE	ARGO GROUP US, INC.	AXIS U.S. INSURANCE	BOILER & PROPERTY CONSULTING
AMERICAN SECURITY INS. CO.	ARGO RE LTD	AXIS U.S. INSURANCE (GA)	BOLLINGER, INC
AMERICAN SOUTHERN INS CO	ARGONAUT GREAT CENTRAL INS CO	BAHAMAS FIRST GENERAL	BOND EXPERTS II LTD.
AMERICAN SPECIALTY INS & RISK	ARGONAUT INSURANCE CO (SURETY)	BAILEY SPECIAL RISKS INC.	BOND NOTARY FEES
AMERICAN SPIRIT INSURANCE CO.	ARGONAUT INSURANCE COMPANY	BANKERS INSURANCE COMPANY	BOND SAFEGUARD INSURANCE CO
AMERICAN STANDARD LLOYD'S INS	ARGONAUT-MIDWEST INSURANCE CO	BANKERS STANDARD INSURANCE CO.	BORDEN-PERLMAN INS AGENCY INC
AMERICAN STATES INS CO OF TX	ARIEL REINSURANCE COMPANY LTD	BANNER LIFE INSURANCE COMPANY	BOSTON MUTUAL LIFE INS. CO.
AMERICAN STATES INSURANCE CO.	ARISE BOILER INSPECTION & INS	BARBER STEWART MCVITTIE &	BOSTON OLD COLONY INSURANCE CO
AMERICAN STATES LIFE INS CO	ARISE, INC.	BARTLETT, BAGGETT & SHANDS	BRAISHFIELD ASSOCIATES, INC
AMERICAN STATES LLOYDS INS CO	ARROWHEAD GENERAL INS AGENCY	BASS UNDERWRITERS INC.	BRICKSTREET MUTUAL INS CO
AMERICAN STEAMSHIP MUTUAL P&I	ARTEX RISK SOLUTIONS	BB&T Insurance Services	BRICKSTREET MUTUAL INS. CO
AMERICAN STRATEGIC INSURANCE	ARTHUR J. GALLAGHER & CO	BB&T PREFERRED BUSINESS	BRIDGEFIELD CASUALTY INS. CO.
AMERICAN UNION RISK ASSOC,LLC	ARTHUR J. GALLAGHER(UK) LTD.	BB&T TANNER INSURANCE SERVICES	BROCKERS NATIONAL LIFE ASSURANC
AMERICAN UNITED LIFE INS. CO.	ARTISAN & TRUCKERS CASUALTY CO	BB&T/CARSON INS. SERVICES	BROCKERS RISK PLACEMENT SERV
AMERICAN WESTERN HOME INS CO	ASCOT UNDERWRITING INC.	BB&T/LANDRUM VAEGER	BROOKWOOD INSURANCE COMPANY
AMERICAN WHOLESALERS UND LTD	ASEGURADORA MEXICANA S.A.	BCS INSURANCE COMPANY	BROWN & BROWN MARINE
AMERICAN ZURICH INSURANCE CO.	ASPEN AMERICAN INS CO (SURETY)	BE&G INS. & R/I	BROWN & BROWN OF CALIFORNIA
AMERICANA PROGRAM UNDERWRITERS	ASPEN AMERICAN INSURANCE CO	BEAZLEY INSURANCE COMPANY	BROWN & RIDING INS SVCS INC
AMERHEALTH CASUALTY INS CO	ASPEN INSURANCE LIMITED	BEAZLEY, USA INC.	BROWN & BROWN PROGRAMS, LTD.
AMERHEALTH CASUALTY SERVICES	ASPEN INSURANCE UK LIMITED	BELLINGHAM UNDERWITERS INC.	BUILDERS INS GROUP-AGENCY BILL
AMERISURE COMPANIES	ASPEN SPECIALTY INS CO	BENCHMARK INSURANCE CO.	BUILDERS INS GROUP-DIRECT BILL
AMERISURE INSURANCE COMPANY	ASPEN SPECIALTY INS MANAGEMENT	BENCHMARK MANAGEMENT GROUP INC	BUILDERS INSURANCE GROUP
AMERISURE MUTUAL INSURANCE CO	ASSOCIATED INDEMNITY CORP	BENEFIT PROTECT LLC	BURKE-DANIELS CO., INC.
AMERITAS LIFE INSURANCE CORP	ASSOCIATED INS ADMINISTRATORS	BERKELY AGENCY, LTD.	BURLINGTON INSURANCE COMPANY
AMERITAS LIFE INSURANCE CORP.	ASSOCIATED INTERNATIONAL INS.	BERKLEY ADMINISTRATORS	BURNETT & COMPANY, INC.
AmFed NATIONAL INSURANCE CO.	ASSOCIATION INS. CO.	BERKLEY ASSET PROTECTION	BURNS & WILCOX, LTD.
AMLIN EUROPE N.V.	ASSURANCE COMPANY OF AMERICA	BERKLEY AVIATION LLC	BUSINESS INSURANCE GROUP
AMRISC, LP	ASSURANCEFORENINGEN GARD-	BERKLEY INSURANCE COMPANY	BUSINESSFIRST INSURANCE CO.
AMTRUST GROUP	ASSURANT INSURANCE GROUP	BERKLEY LIFE & HEALTH INS CO	C G & B GROUP
AMTRUST INS COMPNAV OF KANSAS	ATAIN SPECIALTY INSURANCE CO	BERKLEY NATIONAL INSURANCE CO	C PRO ASSOCIATES
AMTRUST INTNL UNDWRITS LIMITED	ATESHGHAH INSURANCE COMPANY	BERKLEY OIL & GAS SPECIALTY	C. A. SHEA & COMPANY, INC.
AMTRUST SOUTH	ATHENA ASSURANCE COMPANY	BERKLEY PROFESSIONAL LIAB LLC	CALIFORNIA INSURANCE COMPANY
ANCHOR MANAGING AGENCY	ATLANTIC CASUALTY INSURANCE CO	BERKLEY REGIONAL INSURANCE CO	CANADA LIFE ASSURANCE COMPANY
ANESTHESIOLOGIST'S PROF ASSR	ATLANTIC CHARTER INS CO-DIRECT	BERKLEY RENEWABLE ENERGY	CANADA REVENUE AGENCY
ANTHEM HEALTH PLANS OF VA	ATLANTIC INSURANCE CO	BERKLEY SURETY GROUP LLC	CANADIAN GENERAL INSURANCE CO
ANTHEM HEALTH SYSTEMS	ATLANTIC MUTUAL COMPANY	BERKSHIRE HATHAWAY HOMESTATE	CANAL INDEMNITY COMPANY
ANY UNDERWRITERS INC	ATLANTIC MUTUAL INS CO.	BERKSHIRE HATHAWAY INS. GROUP	CANAL INSURANCE COMPANY
AON (BERMUDA) LTD	ATLANTIC SECURITY LTD (BDA)	BEVCAP MANAGEMENT LLC	CAPACITY MARINE CORPORATION
AON AZERI INS. & REINS.BROKERS	ATLANTIC SPECIALTY INS CO.	BILL BEATTY INS AGENCY INC	CAPITAL HEALTH PLAN, INC.
AON GROUP LIMITED (JFS)	ATRADIUS TRADE CREDIT INS INC.	BISYS SPECIALTY PROGRAMS	CAPITOL INDEMNITY CORPORATION
AON GROUP LIMITED (JFS)	AUDUBON INDEMNITY COMPANY	BITUMINOUS CASUALTY CORP	CAPITOL SPECIAL RISK, INC
AON GROUP LIMITED (NICHOLSON)	AUDUBON INSURANCE COMPANY	BITUMINOUS INSURANCE CO	CAPITOL SPECIALTY INS CORP.
AON GROUP LIMITED(ALEX HOWDEN)	AUTO OWNERS INSURANCE CO.	BLACK WHITE& ASSOC.INS.BROKERS	CAPTIAL BLUE CROSS
AON NORWAY AS	AVIATION INS BROKERS OF NORTH	BLADES MARINE	CAPTIVE RESOURCES LLC
AON REED STENHOUSE, INC.	AVIATION INSURANCE MANAGERS	BLAIS EXCESS & SURPLUS AGENY	CARITEN HEALTH PLAN
AON RISK SERVICES OF TEXAS	AVIATION RISK CONSULTING INC.	BLISS & GLENNON INC	CARMOCHE INSURANCE INC.
AON/HUNTINGTON T. BLOCK INS CO	AVIVA INSURANCE CO. OF CANADA	BLUE CROSS BLUE SHIELD	CAROLINA CASUALTY INSURANCE CO
APEX INSURANCE SERVICES	AXA ART INSURANCE CORP	BLUE CROSS BLUE SHIELD OF	CASTLEPOINT INSURANCE COMPANY
APPALACHIAN UNDERWRITERS, INC.	AXA CORPORATE SOLUTIONS INS CO	BLUE CROSS BLUE SHIELD OF FL	CATAWBA INSURANCE CO. (FLOOD)
APPLICATION COMPANY	AXA CORPORATE SOLUTIONS LLOYDS	BLUE CROSS BLUE SHIELD OF GA	CATLIN INSURANCE CO (UK) LTD
APPLIED UNDERWRITERS INC	AXA EQUITABLE LIFE INS. CO.	BLUE CROSS BLUE SHIELD OF IA	CATLIN INSURANCE CO, LTD TX
ARAB INSURANCE GROUP (BSC)	AXA GLOBAL RISKS	BLUE CROSS BLUE SHIELD OF IL	CATLIN INSURANCE COMPANY INC
ARAB MISR INS GROUP (AMIG)	AXA INSURANCE COMPANY	BLUE CROSS BLUE SHIELD OF LA	CATLIN INSURANCE COMPANY INC.
ARABIAN AMERICAN INSURANCE CO	AXA NORDSTERN ART INS. CORP.	BLUE CROSS BLUE SHIELD OF MI	CATLIN SPECIALTY INSURANCE CO.
ARBELLA PROTECTION INS CO	AXA RE INSURANCE GROUP	BLUE CROSS BLUE SHIELD OF MS	CATLIN UNDERWRITING AGENCY
ARC-EN INSURANCE SERVICES, INC.	AXA RE PROPERTY & CASUALTY INS	BLUE CROSS BLUE SHIELD OF NC	CCI SURETY INC
ARCERI & ASSOCIATES INC	AXA SEGUROS S.A. DE CV	BLUE CROSS BLUE SHIELD OF NM	
ARCH EXCESS & SURPLUS INS. CO.	AXIOM INSURANCE MANAGEMENT LTD	BLUE CROSS BLUE SHIELD OF OK	
ARCH INSURANCE COMPANY	AXIS INSURANCE COMPANY		

AVAILABLE CARRIERS (CONT.)

Name
CENTRAL INSURANCE SERVICES LTD
CENTRE INSURANCE COMPANY
CENTURY HEALTHCARE LLC
CENTURY SURETY COMPANY
CENTURY SURETY UNDERWRITER
CENTURY-NATIONAL INSURANCE CO
CHAMBER INS AGENCY SERVICES
CHARITY FIRST
CHARTER OAK FIRE INSURANCE CO
CHARTIS AEROSPACE INS SVCS INC
CHARTIS EUROPE LIMITED
CHARTIS EXCESS LIMITED
CHARTIS INC.
CHARTIS INS CO PUERTO RICO
CHARTIS INS HONG KONG LIMITED
CHARTIS INSURANCE CO OF CANADA
CHARTIS PROPERTY & CASUALTY CO
CHARTIS SPECIALTY INS CO
CHICAGO INSURANCE COMPANY
CHICAGO UNDERWRITING GROUP INC
CHITTENDEN INSURANCE GROUP
CHUBB
CHUBB & SON
CHUBB ATLANTIC INDEMNITY LTD
CHUBB CUSTOM INS. CO.
CHUBB INDEMNITY INSURANCE CO
CHUBB INS CO OF EUROPE SA
CHUBB INS CO OF NEW JERSEY
CHUBB INS. CO OF AUSTRALIA LTD
CHUBB INSURANCE CO. OF CANADA
CHUBB LLOYD'S INS. CO. OF TX
CHUBB NATIONAL INSURANCE CO.
CHUBB SPECIAL
CIBA INSURANCE SERVICES
CIGNA HEALTH & LIFE INS CO
CIGNA HEALTHCARE OF TEXAS INC
CIGNA HEALTHCARE VOLUNTARY
CINCINNATI INSURANCE CO
CITADEL INSURANCE COMPANY
CITIZENS INS CO OF AMERICA
CITIZENS PROPERTY INS. CORP.
CITY COUNTY INS SERVICES
CITY COUNTY PROPERTY CASUALTY
CK SPECIALTY INSURANCE
CLARENDON AMERICA INS. CO.
CLARENDON NATIONAL INS CO
CLASSIC INSURANCE
CLEARWATER INSURANCE COMPANY
CLEARWATER MARINE
CM&F GROUP, INC.
CNA
CNA CCC RISK MANAGEMENT (PROP)
CNA HEALTHPRO
CNA INSURANCE COMPANIES
CNA INSURANCE COMPANY LIMITED
CNA INTERNATIONAL
CNA PRO - INSURANCE
CNA SURETY
CNA SURETY (ACCTS RECEIVABLE)
CNA SURETY ACCTG DEPT-ATTN:A/R
CNA SURETY CORPORATION GROUP
CNA/CCC RISK MANAGEMENT
COCHRANE & COMPANY
CODAN INSURANCE LTD
CODAN MARINE SERVICES

Name
COGENT RESOURCES LTD
COLEMONT INS BROKERS OF GA LLC
COLEMONT INS BROKERS OF TX LP
COLEMONT INSURANCE BROKERS OF
COLONIA INSURANCE CO
COLONIAL AMERICAN CASUALTY &
COLONIAL COUNTY MUTUAL INS CO
COLONIAL LIFE & ACCIDENT
COLONY INSURANCE COMPANY
COLONY NATIONAL INSURANCE CO.
COLONY SPECIALTY INSURANCE CO.
COLUMBIA CASUALTY COMPANY
COLUMBIA MUTUAL INSURANCE CO
COMBINED INSURANCE CO OF AMER
COMBINED SPECIALTY INS CO
COMMERCE & INDUSTRY INS. CO.
COMMERCIAL INSURANCE CO. OF
COMMERCIAL SECTOR INS BROKERS
COMMERCIAL UNDERWRITERS INS CO
COMMERCIAL UNION ASSURANCE CO
COMMONWEALTH INSURANCE COMPANY
COMPANHIA DE SEGUROS ALIANCADA
COMPANION COMMERCIAL INSURANCE
COMPANION LIFE INSURANCE CO
COMPANION PROPERTY & CASUALTY
COMPANY HEALTH COVERAGE
CONNECTICUT INDEMNITY CO
CONNECTICUT SPECIALTY INS. CO.
CONNECTICUT GENERAL LIFE
CONSOLIDATED AMERICAN INS. CO.
CONSUMERS COUNTY MUTUAL INS
CONTINENTAL - LLOYD'S
CONTINENTAL CASUALTY CO
CONTINENTAL DIVIDE INS CO
CONTINENTAL INSURANCE CO
CONTINENTAL WESTERN INS. CO.
CONTRACTORS BONDING AND INS CO
COOPER GAY RISKS SERVICES INC.
COOPER GAY STEELE
COREGIS INDEMNITY CO
COREGIS INSURANCE COMPANY
CORNHUSKER CASUALTY COMPANY
CORPORACION CONTINENTAL
CORPORATE OFFICERS & DIRECTORS
COTTON FIRE & MARINE
COVENANT MANAGEMENT INC
COVENANT MANAGEMENT LLC
COVENTRY HEALTH & LIFE INS CO
COVENTRY INS CO
COVINGTON SPECIALTY INS CO
CRC INSURANCE SERVICES, INC
CRC INSURANCE SERVICES, INC.
CRC OF TEXAS, INC.
CRC UNDERWRITING
CROSSPOINT
CROUSE & ASSOCIATES
CRUM & FORSTER
CRUM & FORSTER INDEMNITY CO.
CRUM & FORSTER SPEC. INS. CO.
CRUMP E&S OF SAN FRANCISCO
CRUMP INS SERVICE OF HOUSTON
CRUMP INS SERVICES OF LA, INC
CRUMP INS SERVICES OF MEMPHIS
CRUMP INS SERVICES OF TX INC
CRUMP INSURANCE SERVICES

Name
CRUMP INSURANCE SERVICES INC
CRUMP INSURANCE SERVICES INC.
CRUMP INTL LTD (BERMUDA)
CU LLOYDS OF TEXAS
CUNNINGHAM GROUP
CV STARR & COMPANY
CYPRESS INSURANCE COMPANY
DAKOTA SPECIALTY INSURANCE CO
DARWIN NATIONAL ASSURANCE CO.
DARWIN PROFESSIONAL U/W INC.
DARWIN SELECT INSURANCE CO.
DAUNTLESS SPECIALTY BROKERAGE
DEANS & HOMER
DEANS & HOMER (SELF STORAGE)
DEEP SOUTH SURPLUS OF GA
DEEP SOUTH SURPLUS OF LA
DEEP SOUTH SURPLUS OF TEXAS
DEERFIELD INSURANCE COMPANY
DELTA DENTAL INSURANCE CO.
DELTA DENTAL OF VIRGINIA
DELTA LLOYD SCHADEVERZEKERING
DEPOSITORS INSURANCE COMPANY
DHOFAR INSURANCE COMPANY
DIAMOND STATE INSURANCE CO
DISCOVER PROPERTY & CASUALTY
DISCOVER REINSURANCE COMPANY
DISCOVER SPECIALTY INS.CO.
DISCOVERY MANAGERS, LTD.
DISTINGUISHED PROGRAMS
DOCTORS COMPANY INS GROUP
DOHA INSURANCE COMPANY - QSC
DONG
DONGBU INSURANCE COMPANY LTD
DOVETAIL MANAGING GENERAL AGCY
E RISK SERVICES
EAGLE STAR INSURANCE CO LTD
EASTERN INS. BROKERS LTD.(EC)
EBCO AVIATION UNDERWRITERS INC
ECCLESIASTICAL INS COMPANY
ECONOMY FIRE & CASUALTY CO
ECONOMY PREFERRED INSURANCE CO
EDGEWATER HOLDINGS COMPANY
EDGEWOOD PARTNERS INS CENTER
EFP WORKERS COMPENSATION FUND
EFU GENERAL INSURANCE
EL ROBLE, SA
EMPIRE FIRE & MARINE INS. CO.
EMPIRE GENERAL LIFE ASSURANCE
EMPIRE INDEMNITY INS. CO.
EMPLOYERS COMP ASSOCIATES, INC
EMPLOYERS COMPENSATION INS CO
EMPLOYERS FIRE INSURANCE
EMPLOYERS INS CO OF NEVADA
EMPLOYERS INS OF WAUSAU
EMPLOYERS MUTUAL CASUALTY CO
ENCOMPASS HOME AND AUTO INS CO
ENCOMPASS INDEPENDENT INS CO.
ENCOMPASS INSURANCE COMPANY
ENCOMPASS INSURANCE COMPANY OF
ENCOMPASS PROPERTY & CASUALTY
ENDURANCE AMERICAN INS COMPANY
ENDURANCE INSURANCE COMPANY
ENDURANCE RISK SOLUTIONS
ENDURANCE SPECIALTY INC, LTD
ENDURANCE SPECIALTY INS. LTD.

Name
ENERGI INSURANCE SERVICES INC
ENERGY INSURANCE MUTUAL
ENERGY TECHNICAL UNDERWRITERS
ENNIA CARIBE SCHADE NV
ENTERTAINMENT PRO INSURANCE
ENVIRONMENTAL INS SERVICES INC
ENVIRONMENTAL POLLUTION GROUP
ENVIRONMENTAL UNDERWRITING
EQUINOX UNDERWRITING
EQUITY PARTNERS INS SERVICES
ERC FRANKONA REINSURANCE LTD
ESIS, INC.
ESSEX INSURANCE COMPANY
EULID MANAGERS
EULER HERMES AMERICAN CREDIT
EVANSTON INSURANCE COMPANY
EVEREST INDEMNITY INSURANCE CO
EVEREST NATIONAL
EVEREST NATIONAL INSURANCE CO
EVEREST REINSURANCE CO
EVEREST SECURITY INSURANCE CO
EVERGREEN NATIONAL INDEMNITY
EXCEL INSURANCE BROKERS
EXCELSIOR INSURANCE COMPANY
EXECUTIVE LIABILITY
EXECUTIVE RE INDEMNITY CO
EXECUTIVE RISK INDEMNITY, INC
EXECUTIVE RISK SPECIALTY INS
EXECUTIVE STRATEGIES INC./DBA
FACTORY MUTUAL INSURANCE CO
FAIRFAX FINANCIAL (USA) GROUP
FAIRFIELD INSURANCE COMPANY
FAIRMONT INSURANCE CO
FALVEY CARGO UNDERWRITING, LTD
FALVEY YACHTS INSURANCE
FARMERS INSURANCE EXCHANGE r
FARMINGTON CASUALTY CO.
FARMLAND MUTUAL INSURANCE CO
FCCI COMMERCIAL INSURANCE CO.
FCCI INSURANCE COMPANY
FCCI INSURANCE GROUP
FEDERAL INSURANCE COMPANY
FEDERAL KEMPER LIFE INSURANCE
FEDERATED RURAL ELECTRIC
FEDERATION INS CO OF CANADA
FIANZAS MONTERREY
FIDELIS CONTINENTAL LLC
FIDELITY & CASUALTY INS. CO.
FIDELITY & DEPOSIT CO MARYLAND
FIDELITY & DEPOSIT CO. OF MD.
FIDELITY & GUARANTY INS. CO.
FIDELITY & GUARANTY INS. UND.
FIDELITY AND DEPOSIT COMPANY
FIDELITY EXCESS & SURPLUS INS
FIDELITY NATIONAL INDEMNITY
FIDELITY NATIONAL INSURANCE CO
FIDELITY NATIONAL PROP & CAS
FIDELITY SECURITY LIFE
FINANCIAL INDEMNITY COMPANY
FIRE & CASUALTY INSURANCE
FIRE AND CASUALTY INS OF CT
FIREMAN'S INSURANCE COMPANY OF
FIREMEN'S INS CO OF NEWARK, NJ
FIRST AMERICAN INSURANCE CO.
FIRST CITY INSURANCE BROKERS

AVAILABLE CARRIERS (CONT.)

Name	Name	Name	Name
FIRST FINANCIAL INSURANCE CO	GLENS FALLS INSURANCE CO	GULF UNDERWRITERS INS CO	HOUSTON SPECIALTY INS CO
FIRST FLORIDIAN AUTO AND HOME	GLOBAL AEROSPACE UNDERWRITING	H S B ENGINEERING INS. LTD	HOWDEN INS BROKERS (LONDON)
FIRST LIBERTY INS CORP	GLOBAL AEROSPACE, INC.	H W WOOD LIMITED	HOWDEN INS BROKERS INC. (USA)
FIRST LIBERTY INSURANCE CORP.	GLOBAL BENEFITS GROUP/TTECARE	HALLMARK COUNTRY MUTUAL INS CO	HPSO
FIRST MERCURY INS. CO.	GLOBAL SPECIAL RISKS, LLC	HALLMARK INSURANCE GROUP	HSB GLOBAL LARGE RISK(EMD-BHAM)
FIRST NAT'L INS CO OF AMERICA	GLOBEX INTERNATIONAL GROUP	HALLMARK SPECIALTY INS. CO.	HUATAI INSURANCE COMPANY OF
FIRST NONPROFIT INSURANCE CO	GMAC RE CORPORATION	HALTON HALL & ASSOCIATES	HUDSON FINANCIAL PRODUCTS
FIRST PENN-PACIFIC LIFE INS CO	GMG UNDERWRITERS INC.	HANOVER AMERICAN INS. CO.	HUDSON INSURANCE COMPANY
FIRST REINSURANCE COMPANY	GOLDEN BEAR INSURANCE COMPANY	HANOVER LLOYDS INSURANCE CO.	HUDSON SPECIALTY INS CO
FIRST SEALORD SURETY, INC.	GOLDEN EAGLE INSURANCE CORP.	HANSEATIC INSURANCE COMPANY	HUDSON SPECIALTY INSURANCE CO
FIRST SPECIALTY INSURANCE CORP	GOTHAM INSURANCE COMPANY	HARCO NATIONAL INSURANCE CO	HULL & COMPANY
FLORIDA HOSPITALITY MUTUAL	GRANITE STATE INSURANCE CO.	HARLEYSVILLE PREFERRED INS CO	HUMANA INSURANCE COMPANY
FLORIDA INT'L INDEMNITY CO	GRAY INSURANCE COMPANY	HARLEYSVILLE WORCESTER INS CO.	HUNTER, KELTY, MUNTZ &
FM GLOBAL GROUP	GREAT AMERICAN ALLIANCE INS CO	HARTFORD ACCIDENT & INDEMNITY	HUNTERSURE LLC
FM INSURANCE COMPANY LIMITED	GREAT AMERICAN ASSURANCE CO.	HARTFORD FINANCIAL PRODUCTS	HURTADO & ASSOCIATES INC.
FORAM BROKERAGE, LTD	GREAT AMERICAN E & S INS CO	HARTFORD FIRE INS. CO. - FLOOD	IOA RE
FOREMOST COUNTY MUTUAL	GREAT AMERICAN FIDELITY INS CO	HARTFORD FIRE INSURANCE CO	IAN H. GRAHAM, INC.
FOREMOST INSURANCE COMPANY	GREAT AMERICAN INS AGENCY	HARTFORD FIRE INSURANCE CO.	ILLINOIS EMCASCO INSURANCE CO
FOREST INSURANCE FACILITIES	GREAT AMERICAN INS CO. - NON AC	HARTFORD INS CO OF THE MIDWEST	ILLINOIS NATIONAL INS. CO
FORT DEARBORN LIFE INS. CO.	GREAT AMERICAN INS. CO	HARTFORD INS OF THE SOUTHEAST	ILLINOIS UNION INSURANCE CO.
FORT DEARBORN LIFE INSURANCE	GREAT AMERICAN INS. CO.	HARTFORD INSURANCE CO/ILLINOIS	IMPERIUM INSURANCE CO
FORTIS CORPORATE INS NV	GREAT AMERICAN INS. CO. OF NY	HARTFORD INSURANCE COMPANY OF	IMS/LONDON AMERICAN INC
FOUNDERS INSURANCE COMPANY	GREAT AMERICAN INSURANCE	HARTFORD LIFE AND ACCIDENT	INDEMCO, L.P.
FRANCHISE INSURANCE GROUP, INC.	GREAT AMERICAN INSURANCE (D&O)	HARTFORD LIFE INSURANCE CO.	INDEMNITY INS CO NORTH AMERICA
FRANK CRYSTAL & CO	GREAT AMERICAN PROTECTION	HARTFORD LLOYD'S INS. CO.	INDEPENDENCE CAS & SURETY
FREEDOM SPECIALTY INSURANCE	Great American Security Ins Co	HARTFORD SPECIALTY COMPANY	INDIAN HARBOR INSURANCE CO
FREEDOM SPECIALTY INSURANCE CO	GREAT CORNERSTONE LIFE & (TX)	HARTFORD STEAM BOILER	INDIANA LUMBERMAN'S MUTUAL
Fringe Insurance Benefits	GREAT DIVIDE INS COMPANY	HARTFORD STEAM BOILER & INSPEC	INDUSTRIAL INDEMNITY CO.
FULCRO INSURANCE INC	GREAT LAKES CASUALTY INS. CO.	HARTFORD STEAM BOILER GROUP	INDUSTRIAL INS. CO. OF HAWAII
FULCRUM INSURANCE COMPANY	GREAT LAKES INSURANCE COMPANY	HARTFORD UNDERWRITERS INS. CO.	INFRASSURE LTD
FULCRUM INSURANCE PROGRAMS	GREAT LAKES REINSURANCE (UK)	HARTFORD-SPECIALTY BILLING	INS CO OF STATE OF PENNSYLVANIA
G & M MARINE INC.	GREAT LAKES REINSURANCE UK	HARVARD PILGRIM HEALTH CARE	INS. CO. OF STATE OF PA.
G CUBE INSURANCE SERVICES INC.	GREAT LAKES REINSURANCE UK PLC	HAWAII EMPLOYERS MUTUAL INS CO	INDEMNITY CO. OF NORTH AMERICA
G J SULLIVAN COMPANY	GREAT MIDWEST INSURANCE CO.	HAWAII MEDICAL SERVICE	INSURANCE COMPANY OF EVANSTON
GAGLIARDI INSURANCE SERVICES	GREAT NORTHERN INSURANCE	HCC GLOBAL FINANCIAL PRODUCTS	INSURANCE COMPANY OF THE WEST
GALLAND GENERAL AGENCY INC.	GREAT POINT INS SERVICES, INC.	HCC INTERNATIONAL INS CO PLC	INSURANCE CORP. OF HANNOVER
GARD P&I (BERMUDA) LTD	GREATER GEORGIA LIFE	HCC LIFE INSURANCE COMPANY	INSURANCE INNOVATORS INC.
GARRISON INSURANCE BROKERS	GREATER NEW YORK MUTUAL INS CO	HCC SPECIALTY INSURANCE CO.	INSURANCE PROGRAMS OF AMERICA
GCUBE	GREAT-WEST LIFE ASSURANCE CO	HCC SPECIALTY UNDERWRITERS INC	INSURERS UNLIMITED INC.
GCUBE UNDERWRITING LIMITED	GREENWICH INSURANCE COMPANY	HDI-GERLING AMERICA INS CO	INSURETRUST COM LLC
GE FINANCIAL ASSURANCE	GREENWICH TRANSPORTATION	HDI-GERLING INDUSTRIAL INS CO	INSURISK EXCESS & SURPLS LINES
GEISINGER HEALTH PLAN	GRESHAM & ASSOC.OF INDIANA INC	HEALTH NET LIFE INSURANCE CO.	INTEGON NATIONAL INSURANCE CO
GEMINI INSURANCE COMPANY	GRESHAM & ASSOCIATES	HEALTH SPECIAL RISK, INC.	INTEGON PREFERRED INSURANCE CO
GENATT ASSOCIATES INC	GROCERS INSURANCE GROUP	HEALTHCARE WORKERS' COMP	INTEGRITY SURETY, LLC
GENERAL AGENCY SERVICES	GROSVENOR BROKERS AMERICA, LLC	HERMITAGE INSURANCE COMPANY	INTELLECTUAL PROPERTY INS.
GENERAL AGENTS INSURANCE CO.	GROUPAMA TRANSPORT	HIGH POINT UNDERWRITERS LLC	INTERCARGO INSURANCE COMPANY
GENERAL INS CO OF AMERICA	GROUPAMA, S.A.	HIGHLANDS INSURANCE CO	INTERNATIONAL AEROSPACE
GENERAL REINSURANCE CORP	GRUNDY WORLDWIDE	HIGHLANDS LLOYDS INS. CO.	INTERNATIONAL FACILITIES
GENERAL SEC INDEMNITY CO OF AZ	GRUPO NACIONAL PROVINCIAL S.A.	HIGHLANDS UNDERWRITERS INS CO	INTERNATIONAL GEN INS CO LTD
GENERAL SECURITY INS CO	GRUPO SEKURA	HIGHMARK CASUALTY INS CO	INTERNATIONAL INS. CO.
GENERAL STAR INDEMNITY CO.	GUARANTEE CO OF N AMERICA USA	HIIG CONSTRUCTION	International Placement
GENERAL STAR NATIONAL INS CO	GUARANTEE COMPANY OF NORTH	HISCOX INS CO (GUERNSEY LTD)	INTERNATIONAL RISK PLACEMENT
GENERALI IARD	GUARANTEE INSURANCE COMPANY	HISCOX INSURANCE COMPANY INC	INTERNATIONAL RISK SOLUTIONS
GENERALI PHILIPINAS INS. CO.	GUARANTEE LIFE INSURANCE CO	HISCOX SPECIALTY INS. CO. INC.	INTERNATIONAL SPECIAL RISKS
GENERALI-UNITED STATES BRANCH	GUARANTY NATIONAL INSURANCE CO	HISCOX, INC.	INTERNATIONAL SPECIALTY INC.
GENESSEE GENERAL AGENCY	GUARDIAN LIFE INS CO AMERICA	HKMB INTERNATIONAL INS.BROKERS	INTERNATIONAL SPECIALTY, INC.
GENESIS INDEMNITY INS CO	GUIDEONE INSURANCE COMPANY	HM LIFE INSURANCE CO.	INTERNEXX LLC
GEORGIA SURETY CO., INC.	GUIDEONE MUTUAL INS CO	HOLYOKE MUTUAL INS. COMPANY	INTERSTATE FIRE & CASUALTY
GERBER LIFE INSURANCE CO	GUIDEONE SPECIALTY MUTUAL INS	HOME STATE COUNTY MUTUAL	INTERSTATE INDEMNITY COMPANY
GERLING AMERICA INS CO	GUILFORD INSURANCE COMPANY	HOMELAND INSURANCE CO OF NY	INTN'L INS CO OF HANNOVER LTD
GERLING-KONZERN ALLGEMEINE	GULF AGENCY	HONG KONG SHANGHAI BANKING	INVESTORS INS CO OF AMERICA
GILES INSURANCE BROKERS	GULF COAST MARINE POOL CO.	HORIZON BLUE CROSS BLUE SHIELD	IRB-BRASIL RESSEGUROS S.A.
GILLINGHAM & ASSOCIATES	GULF COAST MARINE, INC.	HORNBECK OFFSHORE SERVICES INC	IRF ADMINISTRATORS LLC
GLATFELTER INSURANCE GROUP	GULF INSURANCE CO. (UK) LTD	HOUSTON CASUALTY CO EUROPE	IRIDIUM RISK SERVICES INC.
GLENSOE INSURANCE, LTD.	GULF INSURANCE COMPANY	HOUSTON CASUALTY COMPANY	IRONSHORE EUROPE LIMITED

AVAILABLE CARRIERS (CONT.)

Name
IRONSHORE INDEMNITY INC.
IRONSHORE INS SERVICES LLC
IRONSHORE INSURANCE LTD.
IRONSHORE SPECIALTY INSURANCE
ISLAND HERITAGE INSURANCE CO
ISO-POLICY ANALYST USE ONLY
ITAU SEGUROS SA
IZZO INSURANCE SERVICES INC
J & N INSURANCE SERVICES
J. C. STEVENS, INC.
J.H. BLADES
J.M.D. ROSS INSURANCE BROKERS
JACOBSON, GOLDFARB & SCOTT
JAMES GORMAN INSURANCE INC
JAMES RIVER INSURANCE CO.
JAMISON SPECIAL RISK INS.
JARDINE INTERNATIONAL LIMITED
JEFFERSON PILOT FINANCIAL INS
JEFFERSON PILOT LIFE
JLT AEROSPACE (NORTH AMERICA)
JLT OF ALBERTA, CANADA
JLT OF HONG KONG CHINA
JLT OF SANTIAGO CHILE
JLT OF SOLBERG NORWAY
JLT OF SYDNEY AUSTRALIA
JLT OF TORONTO CANADA
JLT RISK SOLUTIONS (BERMUDA)
JLT SPECIALTY LTD (SOLUTIONS)
JLT SPECIALTY LTD.
JOHN ALDEN LIFE INSURANCE CO
JOHN HANCOCK LIFE INS. CO.
JOHN HANDEL & ASSOCIATES INC
JONES BROWN INC.
K & K INS GROUP / AMO SERV CTR
KAISER FOUNDATION HEALTH PLAN
KANAWHA INSURANCE COMPANY
KANSAS CITY FIRE & MARINE
KANSAS MEDICAL MUTUAL INS CO.
KEITH D. PETERSON & CO., INC.
KEMPER PREFERRED
KENTUCKY EMPLOYERS MUTUAL INS.
KEY RISK INSURANCE COMPANY
KEY RISK MANAGEMENT SERVICES
KEYSTONE RISK PARTNERS, INC.
KINSALE INSURANCE COMPANY
KLEIN INSURANCE SERVICES, INC.
KOREAN REINSURANCE COMPANY
LA MERIDIONAL COMPANIA
LA XCESS INSURANCE BROKERS INC
LAMBENT RISK MANAGEMENT
LANCASHIRE INS CO (UK) LIMITED
LANCASHIRE INS COMPANY LIMITED
LANCER INSURANCE COMPANY
LANDMARK AMERICAN INS. CO.
LANDMARK INSURANCE COMPANY
LARIM CORRETORA DE RESEGUROS
LARK INSURANCE BROKING GROUP
LAVARETUS UNDERWRITING AB
LEICHT GENERAL AGENCY
LEMAR & ASSOCIATES, INC.
LEMIC INSURANCE COMPANY
LEXINGTON INSURANCE CO.
LEXINGTON INSURANCE COMPANY
LEXON INSURANCE COMPANIES
LIBERTY

Name
LIBERTY AGENCY U/W (SURETY)
LIBERTY BOND SERVICES
LIBERTY COUNTY MUTUAL INS CO
LIBERTY INS. UNDERWRITERS, INC
LIBERTY INSURANCE CORPORATION
LIBERTY INTERNATIONAL
LIBERTY INT'L UNDERWRITERS
LIBERTY MUTUAL FIRE INS. CO.
LIBERTY MUTUAL INS CO
LIBERTY MUTUAL INS EUROPE LTD
LIBERTY MUTUAL INSURANCE CO
LIBERTY MUTUAL INSURANCE CO.
LIBERTY MUTUAL SURETY
LIBERTY NORTHWEST INS CORP
LIBERTY SURPLUS INS. CORP
LIFE INS CO. OF NORTH AMERICA
LIFE INSURANCE COMPANY OF
LIFEWISE ASSURANCE COMPANY
LIG MARINE MANAGERS, INC.
LIGHTHOUSE UNDERWRITERS, LLC
LINCOLN NATIONAL LIFE INS CO
LLOYD & PARTNERS, LTD.
LLOYD SADD INS BROKER LTD
LLOYD'S OF LONDON SYND. 1688
LLOYD'S OF LONDON SYND. 2020
LLOYDS-(LONDON)
LM INSURANCE CORPORATION
LOMBARD GENERAL INSURANCE CO.
LONDON AMERICAN RISK SPECIAL.
LONDON AVIATION UNDERWRITERS
LONPAC INS BHD C/O JLT ASIA
LOUISIANA WORKERS COMP. CORP.
LUBA CASUALTY COMPANY
LUMBERMAN'S UND ALLIANCE
LYNDON PROPERTY INSURANCE CO
MACAFEE & EDWARDS, INC.
MACLEAN ODDY (RT SPCL-DALLAS)
MADISON NATIONAL LIFE INS.
MAGNA CARTA COMPANIES
MAIDEN SPECIALTY INSURANCE CO
MAIN STREET AMERICA GROUP
MALAYAN INSURANCE CO INC
MANCHESTER SPECIALTY PROGRAMS
MANUFACTURERS ALLIANCE INS CO
MAPFRE TEPEYAC S.A.
MARINE INDEMNITY INSURANCE
MARINE INSURANCE COMPANY LTD
MARINE N-SURANCE BROKERS
MARINE UNDERWRITERS OF
MARKEL AMERICAN INS CO
MARKEL GLOBAL MARINE &
MARKEL INSURANCE COMPANY
MARKETSCOUT
MARKETSCOUT INC.
MARNITZ & ASSOCIATES INS INC
MARSH A/S (DEMARK)
MARSH GMBH (GERMANY)
MARSH USA, INC.
MARSH, LTD.
MARYLAND LLOYD'S COMPANY
MARYLAND/HOME BLDRS INS PROG.
MASSACHUSETTS BAY INS CO
MASSACHUSETTS CASUALTY
MASSACHUSETTS MUTUAL LIFE
MAX BERMUDA LTD

Name
MAX SPECIALTY INSURANCE CO.
MAXIMUM INDEPENDENT BROKERAGE
MAXUM INDEMNITY CO.
MCDUGALL RISK MANAGEMENT LLC
McGOWAN & COMPANY INC
McGOWAN EXCESS CASUALTY
MECC LD (ATTENTA)
MED JAMES, INC.
MEDICAL ASSURANCE
MEDICAL MUTUAL OF OHIO
MEDICAL PROTECTIVE COMPANY
MEDMARC CASUALTY INSURANCE CO.
MEDMARC INSURANCE GROUP
MEMIC INSURANCE AGENCY
MERCATOR RISK SERVICES INC.
MERCHANTS BONDING CO. (MUTUAL)
MERCHANTS BONDING COMPANY
MERCHANTS NATIONAL INS CO
MESA UNDERWRITERS SPECIALTY
METROPOLITAN LIFE INSURANCE
METROPOLITAN PROPERTY & CASUAL
MIC PROPERTY & CASUALTY
MID-CENTURY INSURANCE COMPANY
MID-CONTINENT CASUALTY CO
MIDDLE OAK SPECIALTY
MIDDLESEX MUTUAL ASSURANCE CO
MIDLANDS MANAGEMENT CORP
MIDWEST EMPLOYERS CASUALTY CO
MIDWEST MUTUAL INSURANCE CO.
MIDWESTERN INDEMNITY COMPANY
MIGUEL ANGEL CAMANCHO TORRES
MILLER INSURANCE SERVICES LTD.
MILLERS MUTUAL FIRE INS CO-TX
MILLERS MUTUAL INSURANCE CO.
MILWAUKEE CASUALTY INS COMPANY
MINING INSURANCE MARKETS
MINNESOTA LIFE INS COMPANY
Miscellaneous/Accounting use
Miscellaneous/Referral Fee
MISSOURI EMPLOYERS MUTUAL
MONITOR LIABILITY MANAGERS INC
MONROE GUARANTY INSURANCE
MONTGOMERY INSURANCE COMPANY
MONTGOMERY MUTUAL INSURANCE CO
MONTICELLO INS. CO.
MONTLAKE CASUALTY /
MONTPELIER REINSURANCE LTD.
MONTPELIER US INSURANCE CO.
MOREFAR MARKETING, INC.
MOUNT HAWLEY INS CO
MOUNT VERNON FIRE INSURANCE CO
MOUNTAIN LAUREL ASSURANCE CO.
MS & G INC. (DBA FORTRESS
MSA INSURANCE COMPANY
MSW Expense Reimbursements
MT MCKINLEY MANAGERS LLC
MUNICH REINSURANCE
MUNICH REINSURANCE AMERICA INC
MUNICH-AMERICAN RISK PARTNERS
MUTUAL ASSURANCE ADMINISTATORS
MUTUAL BOILER RE
MUTUAL OF OMAHA INS. CO.
MXGA INC.
MYRON F. STEVES & COMPANY
NAC REINSURANCE COPORATION

Name
NAGICO INSURANCE COMPANY LTD
NAI EXCESS & SURPLUS LINES
NAPCO, LLC
NAS INSURANCE SERVICES INC.
NAS SURETY GROUP
NASON ASSOCIATES, INC.
NASSAU U/W'S (NUA) AGENCY INS
NATIONAL CASUALTY COMPANY
NATIONAL EMPLOYEE BENEFIT CO.
NATIONAL FIRE & MARINE
NATIONAL FIRE INS CO HARTFORD
NATIONAL FIRE INSURANCE CO OF
NATIONAL FLOOD SERVICES
NATIONAL HOLE-IN-ONE ASSN.
NATIONAL INDEMNITY COMPANY
NATIONAL INS. PROFESSIONALS
NATIONAL INSURANCE COMPANY
NATIONAL INSURANCE PARTNERS
NATIONAL INTERSTATE INS. CO.
NATIONAL LIAB. & FIRE INS. CO.
NATIONAL RISK SOLUTIONS
NATIONAL SECURITY FIRE/CAS INS
NATIONAL SPECIALTY INS. CO.
NATIONAL SPECIALTY UNOWRTS
NATIONAL SURETY CORPORATION
NATIONAL TRUCK UNDERWRITING
NATIONAL TRUST INSURANCE CO
NATIONAL UNION FIRE INS CO/LA
NATIONS BONDING COMPANY
NATIONWIDE AGRIBUSINESS INS CO
NATIONWIDE INS COMPANY OF AMER
NATIONWIDE LIFE INSURANCE CO.
NATIONWIDE MUTUAL INS. CO.
NAT'L BENEFITS RESOURCES INC
NAT'L UNION FIRE INS CO/PA
NAUTILUS INSURANCE COMPANY
NAVIGATORS INS SERV OF TX, INC
NAVIGATORS INSURANCE COMPANY
NAVIGATORS INSURANCE GROUP
NAVIGATORS SPECIALTY INS CO.
NBIS CONSTRUCTION & TRANSPORT
NCMIC INSURANCE COMPANY
NETHERLANDS INSURANCE COMPANY
NEW ALLIANCE INS AGENCY INC
NEW DAY UNDERWRITING MGMT LLC
NEW ENGLAND MUTUAL LIFE
NEW HAMPSHIRE INS. CO. LTD.
NEW INDIA ASSURANCE CO. LTD.
NEW MARKETS INSURANCE AGENCY
NEW MEXICO MUTUAL CASUALTY CO
NEW WORLD VENTURES, LTD.
NEW YORK MARINE & GENERAL INS.
NEWMAN MARTIN AND BUCHAN LTD
NEWMARKET UNDERWRITERS INS CO
NGIC
NGM INSURANCE COMPANY
NIAGARA FIRE INSURANCE CO.
NIC INSURANCE COMPANY
NIELSEN INSURANCE INC.
NIF GROUP INC. ETAL
NO AMERICAN SPECIALTY INS CO
NOBLE ASSURANCE COMPANY
NOETIC SPECIALTY INSURANCE CO.
NONPROFITS INSURANCE ALLIANCE
NORMAN-SPENCER AGENCY INC.

AVAILABLE CARRIERS (CONT.)

Name	Name	Name	Name
NORTH AMERICAN CAPACITY	PAIGE-RUANE INC	PROGRAM BROKERAGE CORP	RK HARRISON INS BROKERS LTD
NORTH AMERICAN ELITE INS.CO.	PAN AMERICAN LIFE INS CO	PROGRESSIVE NORTHWESTERN	RK HARRISON INSURANCE BROKERS
NORTH AMERICAN SPECIALTY INS	PARAGON INTERNATIONAL INS.	PROGRESSIVE AMERICAN INS. CO	RLI INSURANCE COMPANY
NORTH EAST INSURANCE COMPANY	PARK BERMUDA	PROGRESSIVE CASUALTY INS CO	RLI SURETY DIVISION
NORTH OF ENGLAND P&I	PARQUETTE & ASSOCIATES, INC.	PROGRESSIVE CASUALTY INS. CO.	ROANOKE TRADE SERVICES
NORTH PACIFIC INSURANCE CO	PARTNER REINSURANCE CO LTD	PROGRESSIVE CLASSIC INSURANCE	ROBERTS & CROW INC.
NORTH RIVER INSURANCE COMPANY	PARTNER REINSURANCE CO. LTD	PROGRESSIVE COMPANIES	ROCHDALE INSURANCE COMPANY
NORTH ROCK INSURANCE CO LTD	PARTNER REINSURANCE EUROPE LTD	PROGRESSIVE COUNTY MUTUAL INS	ROCK RIVER INSURANCE COMPANY
NORTHBRIDGE INDEMNITY INS CORP	PARTNERS RE IRELAND INSURANCE	PROGRESSIVE EXPRESS INS. CO.	ROCKHILL INSURANCE COMPANY
NORTHBROOK INDEMNITY	PARTNERS SPECIALTY GROUP LLC	PROGRESSIVE GULF INS COMPANY	ROCKWOOD CASUALTY INSURANCE CO
NORTHBROOK NATIONAL INS. CO.	PAUL REVERE LIFE INS. COMPANY	PROGRESSIVE HAWAII INSURANCE	ROCKY MOUNTAIN HOSPITAL AND
NORTHBROOK PROPERTY & CASUALTY	PEERLESS INSURANCE COMPANY	PROGRESSIVE MOUNTAIN INS CO	ROPNER INSURANCE SERVICES
NORTHERN INSURANCE CO. OF NY	PELICAN GENERAL INS AGENCY LLC	PROGRESSIVE NORTHERN INS. CO.	ROYAL & SUN ALLIANCE INS PLC
NORTHERN INSURANCE COMPANY OF	PENN LUMBERMANS MUTUAL INS	PROGRESSIVE PALOVERDE INS. CO.	ROYAL INDEMNITY COMPANY
NORTHFIELD INSURANCE COMPANY	PENN MILLERS INSURANCE COMPANY	PROGRESSIVE PREFERRED INS CO	ROYAL INSURANCE CO. OF CANADA
NORTHLAND INSURANCE COMPANY	PENN NATIONAL MUTUAL CASUALTY	PROGRESSIVE SECURITY INS CO.	ROYAL LLOYDS INSURANCE COMPANY
NORTHWESTERN PACIFIC INDEMNITY	PENN NATIONAL SECURITY INS CO	PROGRESSIVE SOUTHEASTERN IN CO	ROYAL SURPLUS LINES INS. CO.
NORWEGIAN HULL CLUB	PENN-AMERICA INS CO	PROGRESSIVE SPECIALTY	RPS (RISK PLACEMENT SERVICES)
NOVA CASUALTY COMPANY	PENN-STAR INSURANCE COMPANY	PROGRESSIVE WEST INS. COMPANY	RSUI INDEMNITY COMPANY
NSM INSURANCE GROUP	PENNSYLVANIA GENERAL INS CO	PRONATIONAL INSURANCE COMPANY	RUTHERFORD INTERNATIONAL INC.
NUCLEAR ELECTRIC INSURANCE LTD.	PENNSYLVANIA MFG ASSN INS CO	PROPERTY & CASUALTY INSURANCE	RVI GUARANTY CO., LTD
NUERNBERGER ALLGEMEINE	PENNSYLVANIA MFR INDEMNITY CO	PROSIGHT SPECIALTY INSURANCE	SAFECO INS CO OF ILLINOIS
NUTMEG INSURANCE COMPANY	PENTAL INSURANCE COMPANY LTD	PROTECTIVE LIFE INS. CO.	SAFECO SURPLUS LINES INS. CO.
OAK RIVER INSURANCE COMPANY	PEOPLES INSURANCE CO CHINA	PROVIDENCE HEALTH PLAN	SAFEGUARD GUARANTEE CO. LTD
OCEAN CONSULTING GROUP	PHILADELPHIA INDEMNITY INS CO	PROVIDENT LIFE & ACCIDENT	SAFETY FIRST INSURANCE COMPANY
ODYSSEY AMERICA REINSURANCE	PHILADELPHIA INDEMNITY INS.CO	PROVIDENT MANAGERS, L.L.C.	SAFETY MUTUAL CASUALTY CORP.
OHIO CASUALTY INSURANCE CO.	PHILADELPHIA INSURANCE CO	PRUDENTIAL INS. CO OF AMERICA	SAFETY NATIONAL CASUALTY CORP
OHIO FARMERS INSURANCE COMPANY	PHILAM INSURANCE CO., LTD.	PT. TUGU PRATAMA KRESNA	SAMPO INDUSTRIAL INSURANCE N V
OHIO SECURITY INSURANCE CO	PHOENIX ASSURANCE COMPANY NY	PUBLIC RISK UNDERWRITING	SARGASSO MUTUAL INS. CO. LTD.
OIL INSURANCE LIMITED (DIRECT)	PHOENIX ASSURANCE COMPANY, LTD	PURVES REDMOND LIMITED.	SCA PROMOTIONS
OKLAHOMA SPECIALTY INS COMPANY	PHOENIX AVIATION MANAGERS, INC	QATAR GENERAL INS. & REINS. CO	SCHWARZMEER UND OSTSEE
OKLAHOMA SURETY CO.	PHOENIX GROUP OF INS BROKERS	QBE INSURANCE (AUSTRALIA)	SCHWEIZERISCHE NATIONAL-VERS
OLD AMERICAN COUNTY MUTUAL	PHOENIX SPECIAL RISK	QBE INSURANCE CORPORATION	SCOR GLOBAL P&C SE
OLD REPUBLIC CONSTRUCTION	PHYSICIANS RECIPROCAL INSURERS	QBE MERCANTILE MUTUAL	SCOR UK COMPANY LIMITED
OLD REPUBLIC GENERAL INS CORP	PICC PROPERTY & CASUALTY LTD	QBE SPECIALTY INSURANCE CO	SCOTT AND WHITE HEALTH PLAN
OLD REPUBLIC INSURANCE CO	PING AN PROPERTY & CASUALTY	QUANTA REINSURANCE U.S. LTD.	SCOTSDALE INDEMNITY
OLD REPUBLIC SURETY	PIONEER SPECIALTY INS GROUP	QUANTA SPECIALTY LINES INS CO	SCOTSDALE INDEMNITY COMPANY
OMAHA PROPERTY AND CASUALTY	PLATTE RIVER INSURANCE COMPANY	QUIRK & COMPANY	SCOTSDALE INSURANCE CO
OMAN INSURANCE COMPANY (PSC)	PMA INSURANCE GROUP	R I S C, INC.	SEABOARD SURETY COMPANY
OMEGA US INSURANCE INC.	PMA INSURANCE GRP-CAPTIVE	R&Q MARINE SERVICES LTD	SEABRIGHT INSURANCE COMPANY
ONE BEACON PROFESSIONAL INS	POINTSURE INSURANCE SERVICES	R. MEARS & CO. LTD.	SEABURY & SMITH
ONEBEACON AMERICA INS. CO.	POLICY MANAGERS	R+V VERSICHERUNG AG	SEAHORSE UNDERWRITERS
ONEBEACON ENTERTAINMENT	POOL REINSURANCE CO. LTD.	RANGER LLOYD'S	SECURITY CONNECTICUT LIFE INS
ONEBEACON INSURANCE COMPANY	POTOMAC INS CO OF ILLINOIS	REALM NATIONAL INSURANCE CO	SECURITY INSURANCE COMPANY OF
ONEBEACON INSURANCE GROUP	PRAETORIAN INSURANCE COMPANY	RED SHIELD INSURANCE COMPANY	SECURITY LIFE INSURANCE CO.
ONEBEACON MIDWEST INSURANCE CO	PRAETORIAN SPECIALTY INSURANCE	REDLAND INSURANCE CO	SECURITY MUT.LIFE INS.CO.OF NY
ONEBEACON PROFESSIONAL INS INC	PREFERRED EMPLOYERS INS CO	REDWOOD FIRE & CASUALTY IN.CO.	SECURITY NATIONAL INSURANCE CO
OSPREY SPECIAL RISKS	PREMERA BLUE CROSS	REGAL INSURANCE COMPANY	SEGUROS ATLAS, S.A.
OUTDOORS INSURANCE COM. INC	PRESBYTERIAN HEALTH PLAN, INC.	REGIONAL INSURANCE SERVICES	SEGUROS CATATUMBO c/o QUORUM CA
OWNERS INSURANCE COMPANY	PRICE FORBES LIMITED	RELiance STANDARD LIFE INS CO	SEGUROS COLPATRIA SA
OXFORD HEALTH PLANS (CT) INC.	PRINCETON EX& SURPLUS LINES CO	RELIASTAR LIFE INS. CO.	SEGUROS COMMERCIAL AMERICA
OXFORD INSURANCE SERVICES LTD	PRINCIPAL LIFE INS CO	RELIASTAR LIFE INSURANCE CO	SEGUROS INBURSA S.A. GRUPO
P. BRUNET ASSURANCE INC.	PRIVATE CLIENT GROUP, A	RENAISSANCE LIFE & HEALTH INS	SEGUROS LA COMMERCIAL SA
PACIFIC EMPLOYERS INS	PROASSURANCE (SIGNATURE HEALTH	RENFREW INSURANCE BROKERS LTD.	SEGUROS MONTERREY AETNA
PACIFIC INDEMNITY COMPANY	PROASSURANCE INDEMNITY CO INC	REPUBLIC INDEMNITY CO OF (CA)	SEGUROS TRIPLE-S INC
PACIFIC INSURANCE CO, LTD	PROASSURANCE SPECIALTY INS	REPUBLIC INSURANCE COMPANY	SEGUROS Y FIANZAS
PACIFIC INSURANCE COMPANY LTD.	PROCENTURY INSURANCE COMPANY	REPUBLIC VANGUARD INS. CO.	SELECT INSURANCE COMPANY
PACIFIC MUTUAL MARINE OFFICE	PROCTOR FINANCIAL, INC.	RETAILERS CASUALTY INS. CO.	SELECTIVE INS. CO. OF NEW YORK
PACIFIC SPEC INS CO*PersLines	PROFESSIONAL BENEFIT	RETIRED DIRECTORS ASSURANCE	SELECTIVE INSURANCE CO OF AMER
PACIFIC WHOLESALE INS BROKER	PROFESSIONAL GOVERNMENTAL	REUBEN WARNER ASSOCIATES, INC.	SELECTIVE INSURANCE CO OF SE
PACIFICARE LIFE AND HEALTH INS	PROFESSIONAL INDEMNITY AGENCY	RFIB GROUP LIMITED	SENECA INSURANCE COMPANY
PACIFICARE LIFE INSURANCE CO	PROFESSIONAL LIABILITY INS INC	RISK INNOVATIONS, LLC	SENECA SPECIALTY INSURANCE CO
PACIFICARE OF CALIFORNIA	PROFESSIONAL LIABILITY INS.	RISK SPECIALIST COMPANY	SENTINEL INSURANCE COMPANY LTD
PACIFICARE OF TEXAS INC	PROFESSIONAL LINES	RISK SPECIALISTS CO INS AGENCY	SENTRY CASUALTY COMPANY
PACIFICSOURCE HEALTH PLANS	PROFESSIONAL UNDERWRITERS	RIVERPORT INSURANCE COMPANY	SENTRY INSURANCE CO.

AVAILABLE CARRIERS (CONT.)

Name
SENTRY INSURANCE GROUP
SENTRY INSURANCE MUTUAL CO.
SENTRY SELECT INSURANCE CO.
SERVICE FEE ONLY
SERVICE LLOYDS INSURANCE CO
SES INS BROKERAGE SERVICES INC
SFB ASSOCIATES
SHAREBRIDGE
SHEFFIELD INSURANCE CORP.
SHELLY, MIDDLEBROOKS & O'LEARY
SHELTER REINSURANCE COMPANY
SHENANDOAH LIFE INS. CO.
SIA INSURANCE CO (RPG) LTD
SIA INSURANCE COMPANY
SIERRA HEALTH & LIFE
SILVER OAK CASUALTY, INC.
SIRIUS AMERICA INSURANCE CO.
SJA AGENCY LLC
SKADEFORSIKRING AB
SKYSURANCE
SMITH,BELL & THOMPSON, INC.
SOCIETE NATIONAL D'ASSURANCES
SOCIUS INSURANCE SERVICES
SOLEN VERSICHERUNGEN AG
SOMPO JAPAN INSURANCE CO. OF
SOUTH AND WESTERN GENERAL
SOUTHERN COUNTY MUTUAL INS CO
SOUTHERN CROSS UNDERWRITERS
SOUTHERN HOSPITALITY
SOUTHERN INSURANCE COMPANY
SOUTHERN MARINE AVIATION
SOUTHERN SELECT INSURANCE CO
SOUTHERN STATES INS. EXCHANGE
SOUTHWEST MARINE AND GENERAL
SOUTHWEST RISK LP
SOVEREIGN GENERAL INS CO
SPARTA INSURANCE COMPANY
SPECIAL CONTINGENCY RISKS LTD
SPECIAL MARKETS INSURANCE
SPECIALTY SURPLUS INS CO
SPECTERA INSURANCE CO
SPIRIT INSURANCE COMPANY
ST PAUL MERCURY INSURANCE CO
ST PAUL SURPLUS LINES INS. CO.
ST. PAUL FIRE & CASUALTY
ST. PAUL FIRE & MARINE
ST. PAUL GUARDIAN INS. CO.
ST. PAUL INDEMNITY COMPANY
ST. PAUL INS. CO. OF ILLINOIS
ST. PAUL INS. CO. OF LA
ST. PAUL INSURANCE COMPANY
ST. PAUL PROTECTIVE INS. CO.
ST. PAUL SEAHORSE
STANDARD FIRE INSURANCE CO
STANDARD INSURANCE COMPANY
STANDARD SECURITY LIFE INS.
STAR INSURANCE COMPANY
STARNET INSURANCE CO.
STARNET INSURANCE COMPANY
STARR AVIATION AGENCY, INC.
STARR EXCESS LIABILITY INS LTD
STARR INDEMNITY & LIABILITY CO
STARR INS & REINSURANCE LTD
STARR INTERNATIONAL USA INC.
STARR MARINE AGENCY

Name
STARR MARINE AGENCY INC.
STARR SPECIALTY LINES INS
STARR SURPLUS LINES INS CO
Starr Technical Risks (New 06)
STATE & COUNTY MUTUAL FIRE INS
STATE COMPENSATION INS FUND
STATE COMPENSATION INS. FUND
STATE FARM MUTUAL AUTOMOBILE
STATE NATIONAL INS. CO, INC.
STATEWIDE BONDING COMPANY INC.
STEADFAST INSURANCE COMPANY
STEAMSHIP MUTUAL U/W ASSOC LTD
STERLING & STERLING INC.
STEWART SMITH SOUTHEAST, INC.
STOCKTON INSURANCE CO
STONINGTON INSURANCE COMPANY
STOP LOSS INS SERVICES INC
STRATEGIC COMP INC
STRATEGIC RISK SOLUTIONS
STRATEGIC RISK SOLUTIONS LTD
STRICKLAND GENERAL AGENCY, INC
SUL AMERICA CIA NACIONAL
SUMITOMO FIRE & MARINE/AMERICA
SUMMIT AMERICA INS SERVICES
SUMMIT CONSULTING INC
SUNLIFE ASSURANCE CO OF CANADA
SUNSHINE STATE INSURANCE CO
SUNZ INSURANCE COMPANY
SUPERIOR UNDERWRITERS,A
SURETEC INSURANCE COMPANY
SWETT & CRAWFORD
SWETT & CRAWFORD CO
SWETT & CRAWFORD GROUP
SWETT & CRAWFORD OF TEXAS, INC
SWETT & CRAWFORD TX
SWISS RE INTERNATIONAL SE
SWISS REINSURANCE AMERICA CORP
SWISS REINSURANCE COMPANY
SYMETRA LIFE INSURANCE CO.
SYNAPSE INC.
TALBOT UNDERWRITING SERVICES
TAPCO UNDERWRITERS INC
TARGET INSURANCE SERVICES
TAS INSURANCE GROUP INC.
TECHNOLOGY INSURANCE COMPANY
TEJAS AMERICAN GENERAL AGENCY
TERRA NOVA HOUSE
TEXAS AGA INC.
TEXAS ASSOCIATED UNDERWRITERS
TEXAS COUNTY MUTUAL INS. CO.
TEXAS MUTUAL INSURANCE CO (DB)
TEXAS PACIFIC INDEMNITY CO.
TEXAS SPECIALTY RISK PROGRAMS
THAMES BATRE' MATTEI BEVILLE
THE ALLEN J FLOOD COMPANIES IN
THE AMERICAN WORKER PLANS INC.
THE ARGOS GROUP
THE ASSOCIATION OF OREGON
THE AUTOMOBILE INS CO OF HARTF
THE BEACON INSURANCE COMPANY
THE BEACON MUTUAL INS CO
THE BELL AGENCY INC.
THE BROKERAGE STORE
THE BUCKEYE UNION INSURANCE CO
THE CHESAPEAKE LIFE INS (TX)

Name
THE COMBINED GROUP
THE GOVERNMENTAL INSURANCE
THE HAND-IN-HAND MUTUAL
THE HARTFORD - LIVESTOCK DEPT
THE HARTFORD INSURANCE COMPANY
THE INSCO/DICO GROUP
THE INSURANCE CENTER
THE INSURANCE PROFESSIONALS
THE LEAGUE OF OREGON CITIES
THE MAHONEY GROUP
THE NORTHERN ASSURANCE CO. OF
THE PHOENIX INSURANCE COMPANY
THE STEAMSHIP MUTUAL UND ASSN
THE TRAVELERS COMPANIES
THE TRAVELERS INS. COMPANY
THE UNITED KINGDOM MUTUAL
THE WESTWOOD GROUP
THOMAS MCGEE, LC
THOMAS MILLER & COMPANY
THOMCO
THOMPSON HEATH & BOND LIMITED
THREADNEEDLE INSURANCE CO LTD
THROUGH TRANSPORT MUTUAL INS.
TIG INSURANCE COMPANY
TIP NATIONAL
TOKIO MARINE & NICHIDO FIRE
TOKIO MARINE EUROPE INS. LTD.
TOPA INSURANCE COMPANY
TORUS INSURANCE (BERMUDA) LTD
TORUS INSURANCE (UK) LIMITED
TORUS NATIONAL INSURANCE CO
TORUS SPECIALTY INSURANCE CO
TORUS US SERVICES INC.
TOWER GROUP COMPANIES
TOWER INS COMPANY OF NEW YORK
TOWER NATIONAL INSURANCE CO.
TOWERSTONE, INC.
TRADERS & PACIFIC INS. CO
TRAFALGAR MARINE INS. SERVICES
TRANSAMERICA LIFE INS. CO.
TRANSGUARD GENERAL AGENCY, INC
TRANSGUARD INS CO OF AMERICA
TRANSPAC MANAGERS, INC.
TRANSPORTATION COVERAGE
TRANSPORTATION INSURANCE CO
TRANSPORTATION INSURANCE CO.
TRANSPORTATION INSURORS INC.
TravCO INSURANCE COMPANY
TRAVELERS AUTO INS. CO. OF NJ
TRAVELERS BOND DEPT.
TRAVELERS CAS & SURETY CO/AM
TRAVELERS CAS & SURETY OF AMER
TRAVELERS CASUALTY CO OF CT
TRAVELERS CASUALTY INS. CO. OF
TRAVELERS COMMERCIAL CASUALTY
TRAVELERS COMMERCIAL INS. CO.
TRAVELERS EXCESS & SURPLUS
TRAVELERS FLOOD INS. PROGRAM
TRAVELERS GUARANTEE COMPANY
TRAVELERS HOME & MARINE
TRAVELERS IND CO. OF AMERICA
TRAVELERS INDEMNITY CO
TRAVELERS INDEMNITY CO OF CT
TRAVELERS INSURANCE CO LIMITED
TRAVELERS LLOYDS INS. COMPANY

Name
TRAVELERS PROPERTY CASUALTY
TRAVELERS PROPERTY CASUALTY CO
TRAVIS PEDERSEN & ASSOC. INC
TRI-ARC FINANCIAL SERVICES,INC
TRIDENT MARINE MANAGERS
TRINITY RISK, LLC
TRI-STATE INS. CO.OF MINNESOTA
TRUCK INSURANCE EXCHANGE
TRUMBULL INSURANCE COMPANY
TRUST ALGERIA INS.& REINS. CO.
TRUST INSURANCE COMPANY -LIBYA
TRUST INT'L INS CO EC(BAHRAIN)
TRUST RE INTERNATIONAL INS &
TRUSTMARK INSURANCE COMPANY
TRYTON INSURANCE GROUP
TT CLUB MUTUAL INSURANCE LTD
TUDOR INSURANCE COMPANY
TUFTS HEALTH PLAN
TWIN CITY FIRE INSURANCE CO.
U S AVIATION UNDERWRITERS
U S SPECIALTY INSURANCE CO
U.S. RISK INSURANCE GROUP
U.S. RISK UNDERWRITERS, INC.
U.S.RISK FINANCIAL SERVICES
ULLICO CASUALTY COMPANY
UND AT LLOYDS/CERTAIN OTHER CO
UNDERWRITERS AT LLOYDS, LONDON
UNDERWRITER'S INDEMNITY
UNDERWRITERS INSURANCE CO. LTD
UNDERWRITERS MARINE SERVICE
UNICARE LIFE & HEALTH INS. CO.
UNIGARD INSURANCE COMPANY
UNIMERICA INSURANCE COMPANY
UNION AMERICA INSURANCE CO LTD
UNION CENTRAL LIFE INS CO
UNION INSURANCE COMPANY
UNION SECURITY INSURANCE CO.
UNION STANDARD INSURANCE CO.
UNITED AMERICAN INSURANCE CO
UNITED CAPITOL ENVIRONMENTAL
UNITED COASTAL INSURANCE CO
UNITED CONCORDIA INS(BENEFITS)
UNITED EDUCATORS INSURANCE
UNITED FINANCIAL CASUALTY CO
UNITED FIRE & CASUALTY
UNITED HEALTHCARE INS. CO.
UNITED INSURANCE COMPANY LTD
UNITED NATIONAL INS. CO.
UNITED OF OMAHA LIFE INS CORP
UNITED SELF INSURANCE SERVICES
UNITED SHORTLINE INSURANCE
UNITED SPECIALTY INSURANCE CO
UNITED STATES FID. & GUAR. CO.
UNITED STATES FIDELITY &
UNITED STATES FIRE INSURANCE
UNITED STATES LIABILITY INS
UNITED STATES LIABILITY INS CO
UNITED STATES LIABILITY INS.
UNITED STATES SURETY COMPANY
UNITED WISCONSIN LIFE INS CO
UNIVERSAL INSURANCE COMPANY
UNUM LIFE INS. CO OF AMERICA
US ASSURE
US ASSURE INS. SERVICES INC.
US FINANCIAL LIFE INS. CO.

AVAILABLE CARRIERS (CONT.)

Name
US RISK BROKERS INC.
US SPECIALTY UNDERWRITERS INC
USA INSURANCE SERVICES, INC.
USG INSURANCE SERVICES INC.
VALIANT INSURANCE COMPANY
VALLEY FORGE INSURANCE BROKERA
VALLEY FORGE INSURANCE COMPANY
VALLEY FORGE LIFE
VANLINER INSURANCE COMPANY
VCW, INC.
VENTURE INSURANCE PROGRAMS INC
VERA CRUZ SEGUADOR, S.A.
VERLAN FIRE INSURANCE COMPANY
VESTA LLOYD'S INS. CO.
VICTOR O SCHINNERER & CO INC
VIGILANT INSURANCE COMPANY
VIKING BOND SERVICE
VIRGINIA SURETY COMPANY, INC.
VIRTUAL MGU, INC.
VISION SERVICE PLAN
VISTA INS. PARTNERS OF ILLINOIS
VOYAGER INDEMNITY INS. COMPANY
W F T INSURANCE SERVICES LTD
W R BERKLEY INS. (EUROPE) LTD
W. BROWN & ASSOCIATES INS. SVCS
W. H. BROWNYARD CORPORATION
WASHINGTON INT'L INSURANCE CO
WAUSAU BUSINESS INSURANCE CO.
WAUSAU GENERAL INSURANCE CO
WAUSAU GENERAL INSURANCE CO.
WAUSAU INSURANCE
WAUSAU UNDERWRITERS INS CO
WAXMAN, CAVNER & OLIVER
WELLINGTON SPECIALTY INS CO.
WELLS FARGO INS. SERVICES NW
WESCO INSURANCE COMPANY
WEST AMERICAN INSURANCE CO
WEST BEND MUTUAL INSURANCE CO.
WEST COAST LIFE INS. CO.
WESTCHESTER FIRE INS CO
WESTCHESTER SURPLUS LINES
WESTERN HERITAGE INSURANCE CO.
WESTERN MARINE INS. SVCS CORP.
WESTERN NATIONAL ASSURANCE CO
WESTERN NATIONAL MUTUAL GROUP
WESTERN NATIONAL MUTUAL INS CO
WESTERN SECURITY SURPLUS
WESTERN SURETY COMPANY
WESTERN WORLD INSURANCE CO, INC
WESTFIELD INSURANCE COMPANY
WESTPORT INSURANCE CO
WESTPORT INSURANCE CORP
WESTROPE & ASSOCIATES
WFT INCORPORATED
WILLIS - CANADA
WILLIS (BERMUDA) LIMITED
WILLIS AS
WILLIS CORROON CORPORATION
Willis Limited (New Orleans)
WILLIS OF ALABAMA
WILLIS OF DELAWARE INC.
WILLIS OF ILLINOIS, INC.
WILLIS OF ILLINOIS/HPP ALEMBIC
WILLIS OF NEW HAMPSHIRE
WILSHIRE INSURANCE COMPANY

Name
WILSHIRE NATIONAL INS AGENCY
WIND RIVER REINSURANCE COMPANY
WINDSOR INS. CO.
WM. H. MCGEE & CO., INC.
WNC FIRST INS SERVICES (FLOOD)
WOODUS K. HUMPHREY & CO., INC.
WORKCARE SOUTHEAST INC
WORKERS FIRST COMP FUND
WORLD WIDE FACILITIES, INC.
WORLDWIDE FACILITIES INC.
WSIB MOTORSPORTS INSURANCE
XL ENVIRONMENTAL, INC.
XL EUROPE LIMITED
XL INSURANCE AMERICA, INC.
XL INSURANCE CO LTD
XL INSURANCE GROUP
XL INSURANCE SWITZERLAND LTD
XL LLOYDS INSURANCE CO
XL MARINE AND OFFSHORE ENERGY
XL SPECIALTY INSURANCE CO.
XL SPECIALTY INSURANCE COM
YORK
YORK ALLIANCE INS. BROKERS INC
YORK S/A CORRECTAGENS
ZE/USI INSURANCE SERVICES
ZENITH INSURANCE COMPANY
ZNAT INSURANCE CO
ZURICH AMERICAN INS CO OF IL
ZURICH AMERICAN INSURANCE CO.
ZURICH ARGENTINA COMPANIA DE
ZURICH AUSTRALIAN INS LIMITED
ZURICH INS CO (BERMUDA BRANCH)
ZURICH INSURANCE CO LIMITED
ZURICH INSURANCE PUBLIC
ZURICH NORTH AMERICA
ZURICH RE U.K.
ZURICH SPECIALTIES LONDON LTD

5. Provide information documenting your brokerage firm's ability to assist the County in proving and resolving difficult claims with insurers.

Through long established contacts with major markets and experience in handling some of the industry's most complex claims, we are able to overcome obstacles that inevitably arise in the event of a claim. Our goal is to ensure that those obstacles do not result in reduced or delayed claim settlements to our clients. We work hard to settle claims expeditiously, with the insureds best interests, business policies and public relations in mind.

The McGriff Houston office is invested in providing excellent claim service to our clients. The McGriff Houston claims department is staffed with over 25 employees whose sole job is to push claims to resolution for our clients. Our claim department experience consists of former carrier insurance company adjusters, supervisors/managers, independent adjusters, in-house risk management department claim and litigation managers, loss control technicians and attorneys. These individuals have been involved in some of the most complex and high profile claims.

McGriff Houston serves 57 Public Entities that sustained Hurricane Harvey damage/insurance claims. We are proud to admit that we still provide Risk Management/Insurance services to these Public Entities that sustained Hurricane Harvey damage. We attribute this to our claim department's ability to push claim adjusters to claim resolution as quickly as possible and our ability to deploy the necessary resources that our clients need when it matters the most.

Success Story: Hurricane Harvey Recovery – Humble ISD, Kingwood, TX

On the days surrounding August 25, 2017, Category 4 Hurricane Harvey inundated the Texas Gulf Coast with over 50 inches of rain during a four-day period causing historic flooding that severely impacted many local communities, including one of the largest school districts in Texas, Humble Independent School District (HISD). Forty of HISD's 43 campuses sustained damage from the storm resulting in a loss in excess of \$100M, with approximately 2,700 students displaced from HISD's most heavily damaged campus, Kingwood High School (KHS), a 600,000 square foot high school that was under five feet of water for up to a week.

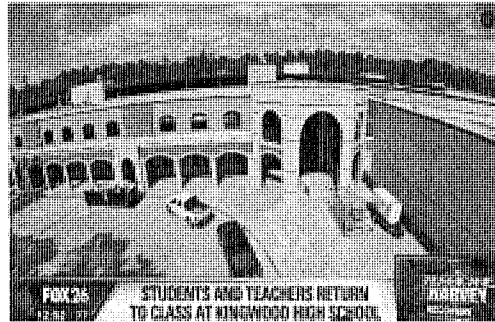
McGriff acted immediately, working closely with DRS disaster recovery consultants to coordinate insurance carrier representatives, NFIP adjusters, FEMA representatives, and restoration contractors to facilitate both financial and physical recovery. A strategy was quickly developed to optimize financial recovery between all available funding sources (Property Insurance, NFIP, FEMA, and available grants) that resulted in over \$30M received within the first 3 months of the catastrophe. Our client was also the first local government to receive reimbursement funds from FEMA, including the first to receive obligation of \$56M for permanent repairs.

Our team also developed a physical recovery strategy that coordinated a wide range of resources including FEMA/insurance recovery experts, estimators, and project managers, among others, to accelerate the repairs to Kingwood High School. This successful recovery strategy resulted in 6,000 displaced students returning to their High School on by Spring Break, less than seven months after the loss, which far exceeded initial recovery expectations of 12-18 months. The return to Kingwood HS ended the 40-mile round trip daily commute for students and teachers to a shared campus and enabled KHS seniors to graduate from their own school. The recovery team was also successful in obtaining approval from FEMA to fund the building of brand-new Agricultural Barns at a new location.

Our efforts were instrumental in turning this Hurricane Harvey nightmare into a success story for the district through our ability to view the full recovery picture and our strong industry relationships that allowed us to bring in the qualified resources necessary to meet the district's financial and physical recovery needs.



Harvey Flooding at Kingwood High School



Restored Kingwood High School Campus

Claims Services

The importance of claims management to the insurance process can never be overstated. The response of an insurance carrier and its product to a claim situation reveals what the insurance buyer has purchased. Throughout the claims process, your entire McGriff team is actively involved in discussions with your loss adjusters, insurers and legal representatives.

The following outlines the typical responsibilities for McGriff claims professionals:

Pre-Renewal	Year Round	After a Claim
• Review insurance program with account executive • Establish claim-handling procedures for the carriers • Assist with internal claims procedures and reporting requirements • Develop and implement specific claim strategies	• Facilitate and attend claim review sessions • Perform claim audits • Review, analyze and discuss large claims • Provide customized executive summaries, management reports, flow charts and open item lists covering claim activities • Participate in loss adjustment meetings	• Advocate for client, dispute resolution with claims adjusters • Liaise with adjusters, underwriters, attorneys and client staff • Expedite partial payments, make recommendations on settlements, and monitor reserves • Respond to reservation of rights letters and coverage denials • Continually track identified claims and monitor dates for full settlement



McGriff employs a full-time claim staff dedicated to facilitating claims for our clients. In addition, a dedicated Claims Account Executive is permanently assigned to each client's account. We believe that the performance of adjusters and claims personnel significantly influences the ultimate cost of a loss. By aggressively supervising the activities of adjusters and claims personnel, quality of service and loss reserving can be improved. Frank DeLeon will continue to be Fort Bend County's dedicated Claim Account Executive.

6. Provide a statement of whether the brokerage firm will agree to disclose all compensation it receives as a result of contracts placed on behalf of County and, if not, an explanation of why it will not provide such information.

McGriff is 100% transparent about the compensation received for our services and committed to a purely fixed flat fee compensation.

7. Indicate whether the brokerage firm provides full risk identification and analysis as part of broker's normal contracted services.

McGriff Houston has a fully staffed Loss Control/Risk Identification Department and Risk Analytics/Analysis Department. These services will be extended to Fort Bend County at no additional cost outside of our service fee. These services will be further illustrated in response to question 9.

8. Describe what the brokerage firm will do to assure that proper attention will be given to the County's account now and as its book of business grows.

Our service team for Fort Bend County is 100% local. We are accessible to you day or night, weekends and holidays. Several of the service team members are long time Fort Bend County residents. Due to our local presence, we are best suited to identify new risks and exposures associated with County operations and programs.

As County residents, we are highly motivated to protect County assets, address exposures and provide outstanding service. Failure to adequately perform for Fort Bend County creates a substantial reputational risk for our team.

Our Claims Response time will continue to be second to none and we are able to attend any last minute or impromptu meetings, claim reviews, site visits, etc. on short notice.

Besides our local presence, we serve the needs of several Texas Counties and local governments on a daily basis. We attribute our success to a "Client Centric" service model and our technical ability.



9. Describe any and all products offered that are unique to the firm such as risk management information systems, loss control programs, actuarial services, etc. Provide a brief description of Proposer's firm, and the scope and nature of services routinely provided by Proposer. Demonstrate the ability to perform the required services as described in this RFP. Indicate Proposer's understanding of the purpose and scope of the proposed services as evidenced by the quality of the proposal submitted. Identify the type of business (corporation, partnership, sole proprietor, etc.) under which Proposer's firm operates, date business started, and license number to do business in the State of Texas.

McGriff is an Insurance/Risk Management brokerage firm that specializes in providing Risk Management services to Texas Public Entities. We believe Fort Bend County will recognize our ability to perform the required services as described in the RFP. We understand the purpose and the scope of proposed services outlined and are committed and qualified to provide said services to Fort Bend County. McGriff is a wholly owned subsidiary of Truist Insurance Holdings, founded in 1922 and is licensed to do business in the State of Texas (License #6816)

We view our services in four quadrants of equal importance below.



Risk Management

McGriff will assist with designing and implementing a customized loss control plan that significantly reduces the frequency and severity of injuries.

- Risk Control Assistance and Training
- On Site Services
- Emergency Response/Disaster Management
- Safety Training Program Development & Maintenance
- Claims Analysis
- Coordination w/ Insurers
- Documentation
- Property Risk Control Services
- Transportation Exposures
- Fleet safety program evaluation
- Driver Training



Data and Analytics

Our analytics team provides needed technical support to enable our clients to make more informed financial decisions. Some examples of these services include:

- Casualty Analytics
- Loss Stratification & Analysis
- Loss Projection
- Collateral Analysis and Negotiation
- Total Cost of Risk (TCOR) Analysis
- Experience Modifier Rating Verification
- Property Analytics & Benchmarking
- Catastrophe (CAT) Modeling
- Historical Catastrophe Event Analysis
- Natural Hazard Mapping and Reporting
- Building Valuation Services



Claims Management

Our goal is to ensure that obstacles do not result in reduced or delayed claim settlements to our clients.

- Claims Administration
- Actuarials / Analytics
- Third-Party Administration/Consulting
- Loss Trend Analytics
- Open Claims Meetings
- Claims Reporting
- FEMA Claims Preparation Expertise
- Disaster Management Services



Daily Service and Assistance

Service is the essence of what we do and is truly our main differentiator from our competitors.

- Open Items and Stewardship/Strategy Meetings
- Audit services for Legacy Billings and Premium Adjustments
- Budgeting / Cost Allocation Assistance
- Certificates of Insurance and Auto ID cards
- Exposure Schedule Management
- Benchmarking (TCOR, Limits, etc.)
- RMIS Assistance (document storage, analytics, etc.)

McGriff Houston has developed a quantitative analytics practice headed by Tom Bradt to support Texas Public Entities. Our analytics team provides needed technical support with complex mathematical and statistical modeling which will enable Fort Bend County to make more informed financial decisions. Some examples of these services include:

Loss Stratification and Analysis

Determine an optimal range of deductibles that will provide the best premium consideration while shielding Fort Bend County from absorbing an inordinate amount of risk.

Loss Projection

Projection of the expected losses for the upcoming year within the deductible/retention for each line. This will assist Fort Bend County in accruing for probable losses and is used in collateral calculations.

Collateral Analysis and Negotiation

Verify that the current carrier's collateral requirement is reasonable and contest as necessary. Assist with legacy collateral wind down to ensure an expedient return of outstanding collateral.

Program Testing and Optimization / Projected Cost of Risk

McGriff incorporates the loss stratification results into our marketing efforts to guide the underwriters to the optimum program structure and pricing. The loss picks are incorporated into the various quotes to determine the optimal projected cost of risk for the upcoming policy period.

Customized Reports

We can create reports to help Fort Bend County track insurance costs, such as Cost of Risk reports (total cost of risk by policy year) and loss allocation by location / division (dependent upon data availability in the loss runs). We have included some sample reports for your reference in Appendix A.

Catastrophe Risk Assessment Reports

We can produce reports that will indicate the severity of the perils according to a set of assumptions that are set within the simulation. These reports will help Fort Bend County make more informed decisions on Catastrophe limits and deductibles.

Please refer to Appendix A for Sample Analytic Charts.

Loss Prevention Services

McGriff is committed to helping you avoid costly claims through state of the art loss control programs, and have a myriad of services available. We can assist with designing, implementing or enhancing a customized safety and loss control program that significantly reduces the frequency and severity of injury. Our professionals will help you assess the effectiveness of your existing programs and procedures, and provide specific recommendations for improvements. We work with your staff to help them recognize problems and develop solutions before a loss occurs. By becoming involved in these programs, our goal is to provide the groundwork necessary for prevention.

Our approach to risk control service focuses on the specific needs of our client's organization. By listening to you and learning about your operations, we can design and implement a customized safety and loss prevention program that will significantly reduce the frequency and severity of injuries. We begin by determining what is currently working well for you, and identify issues your leadership team feels are important for long-term sustainable objectives. We also act as the coordinator of all insurance carrier loss prevention and/or control services and unbundled vendor contracts to assure promised services are delivered.

McGriff strongly believes that safety engineering and claims management should not be viewed as separate functions. Analysis of claims data can provide a roadmap for concentrating loss control efforts that will derive the greatest results.

Our team of loss control professionals average over 21 years of experience in property protection, safety and loss prevention, workers' compensation, and liability in a broad range of industries.

Some specific loss control services are:

- Construction Risk Management Services
- Property Loss/Risk Control
- Coordination with Insurers
- Rapid Response for Loss Situations
- Safety Training
- On-Site Services
- Emergency Response/Disaster Management
- Claims Analysis

Rapid Response for Loss Situations

McGriff's loss control professionals are available on a 24/7 basis, and can respond immediately in the event of a significant loss. We normally arrive before the adjuster, and begin taking pictures and gathering information immediately to assist with prompt claim processing. This quick response assists you and your insurer with defining requirements to bring the loss to a rapid and satisfactory conclusion.

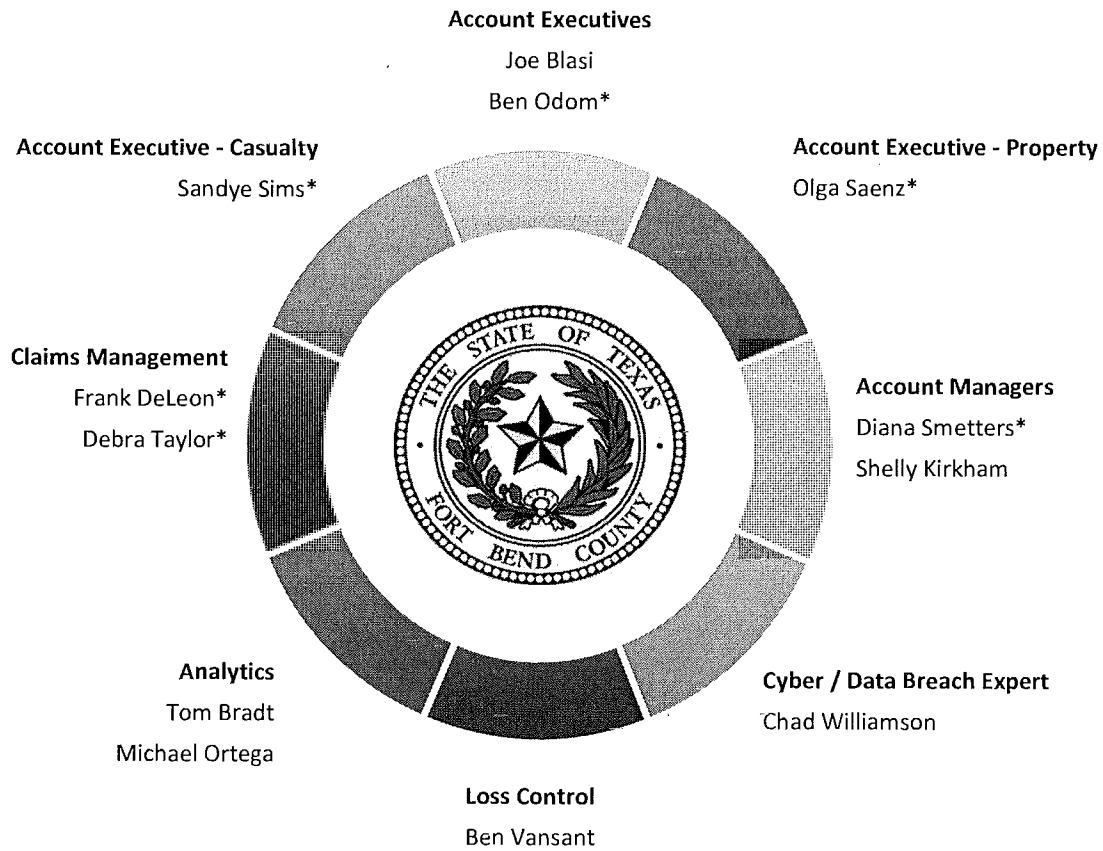
McGriff's Loss Control Services:

- Safety programs; training modules and manuals
- Analyses of losses by:
 - Job site
 - Accident
 - Type of injury
 - Exposure
- Monitoring for compliance w/procedures and insurer requirements
- Documenting loss situations to facilitate the claims' process
- 24/7 availability

Tab 2 Brokerage Team

Provide an organizational chart showing the level of organizational responsibility and the services provided by each of the members of your firm's proposed service team. Include resumes of those principals, partners and other key service staff members who will be directly involved in the overall brokering and consulting effort. Resumes and organizational charts will be considered as "public information" please do not include any personal information that the person(s) do not want to be considered as "public information".

SERVICE TEAM MEMBERS



* Fort Bend County Residents

Please refer to Appendix B for team member resumes.

Project Team's Responsibilities

Account Executives:

Joe Blasi, ARM, PCU

Ben Odom

- Overall client responsibility
- Strategic planning
- Program design
- Marketing coordination
- Market updates
- Supervision/negotiation of major claims

Marketing Account Executives:

Olga Saenz

Sandy Sims

- Technical Service
- Primary Marketing Team
- Contract analysis
- Special projects
- Wording and Policy Analysis

Account Service Representatives:

Diana Smetters

Shelly Kirkham

- General Account Support services
- Binders & Certificates of Insurance
- Policy documentation
- Open items reporting
- Quarterly report adjustments

Claims Management:

Frank DeLeon

Debra Taylor

- Active involvement in claims management program
- Monitor all reported claims to conclusion
- Participate in claim review sessions
- Coordinate claim services with insurers
- Perform claim audits
- Management of complex claims

Risk Analytics/Actuarial:

Tom Bradt

Michael Ortega

- Loss stratification and analysis
- Loss projections
- Program testing and optimization
- Customized reports as requested

Loss Prevention

Ben Vasant

- Site specific audits

Cyber / Data Breach Expert

Chad Williamson

- Cyber and Privacy Coverage
- Professional / Errors & Omissions Liability
- Commercial Crime
- Special Crime



Servicing Office Location

McGriff Insurance Services, LLC.

10100 Katy Freeway, Suite 400 | Houston, Texas 77043

(800) 877-1449 - (713) 877-8975 - (713) 877-8974 fax, www.mcgriff.com

Team Member	Phone Number	Email
Joe Blasi, CPCU, ARM Co - Team Leader	D: (713) 940-6565 C: (713) 213-9934	jblasi@mcgriff.com
Ben Odom Co - Team Leader	D: (713) 273-2606 C: (281) 636-0591	bodom@mcgriff.com
Olga Saenz Underwriting Management	D: (713) 402-1475 C: (713) 213-6930	osaenz@mcgriff.com
Sandy Sims Underwriting Management	D: (713) 940-6584 C: (281) 221-0766	ssyms@mcgriff.com
Diana Smetters Account Manager – Service Representative	D: (713) 940-6596	dsmetters@mcgriff.com
Shelly Kirkham Account Manager – Service Representative	D: (713) 273-2648	skirkham@mcgriff.com
Chad Williamson Cyber / Data Breach	D: (713) 940-6548	cwilliamson@mcgriff.com
Tom Bradt Risk Analytics	D: (713) 940-6563	tbradt@mcgriff.com
Michael Ortega Risk Analytics	D: (713) 273-2603	mortega@mcgriff.com
Ben Vasant Loss Prevention	C: (832) 499-5581	bvasant@mcgriff.com

24-Hour Claims Contacts

We offer 24/7 reporting of claims via 1-800, on-line or fax. Once received, our staff reports the claim to the appropriate carrier, creates a follow-up diary, and continues to monitor the claim to its conclusion.

Frank DeLeon Claims Management	D: (713) 402-1420 C: (713) 408-8553	fdeleon@mcgriff.com
Debra Taylor Claims Management	D: (713) 273-2679 C: (832) 545-8776	dtaylor@mcgriff.com

Tab 3 Innovation and Effectiveness

Describe proposer's understanding, responsiveness and approach to the insurance brokerage and consultative services required. Also include descriptions of:

1. Any broker service innovations proposer is proposing.

As the leading broker provider for large Texas Counties, we truly understand what it takes to effectively service the needs for a large County like Fort Bend County. We are confident in our abilities to perform for our clients and are certain Fort Bend County will continue to benefit from the enhanced service we provide to the County.

McGriff is committed to the use of a Total Cost of Risk approach to assist Fort Bend County in achieving reductions in its overall risk management costs. Our "Cost of Risk" approach embodies a consultative methodology that includes critical disciplines including risk management, risk control, claims management and risk financing; all working together in a collaborative effort to identify, control, and mitigate corporate risks associated with the delivery of internal and external customer services. As an example, our casualty (workers' compensation, general liability and automobile liability) program auditing and review services include the following:

- Validating audited premiums for workers' compensation
- Auditing workers' compensation experience modifiers
- Reviewing/analyzing historical loss data for underwriting purposes and process improvement opportunities
- Analyzing current and historical insurance program collateral requirements
- Benchmarking comparative industry cost of risk dollars associated with specific lines of insurance
- Performing risk management contractual reviews
- Analyzing and redesigning internal cost of risk allocation programs

These services focus primarily on the fixed costs and the administrative costs that are included in the overall cost of risk. We also provide services that focus on the variable costs associated with the casualty program. Since losses/claims generally account for approximately 80% of the cost of risk, we have developed consultative methodologies for our Texas Public Entity clients that identify, evaluate and mitigate the cost drivers associated with the variable claims' costs. Those services include the following:

Claims management evaluation services that include claim file audits, third party administrator performance reviews, contract compliance audits, process improvement reviews and comparative studies for in-house versus outsourced claims management functions. McGriff has developed audit diagnostic tools used to evaluate third party claim administrator claim management performance.

Corporate safety/risk control evaluations that include an overall review of safety programs and their effectiveness. The areas of focus include program awareness, employee participation, contractor safety, inspections, hazard reporting, hazard control, data analysis, preventative maintenance, emergency action plans and training initiatives. McGriff has developed a diagnostic tool used to audit / review and help evaluate a loss control program. We also assist in the development of training programs, perform incident investigations, develop return to work programs and assist with industrial hygiene services.

Statistical data review and analysis services that are designed to identify loss trends, pinpoint divisional and location performance issues, identify injury trends and determine areas of the operations that need improvement.



Our Risk Data Analytics team provides technical support with complex catastrophe and statistical modeling to enable our clients to make more informed financial decisions. We don't just send a cold submission to the marketplace; we present a completed underwriting file to the underwriters as follows:

Loss Stratification and Analysis

Determine an optimal range of deductibles that will provide the best premium value while shielding the County from absorbing an inordinate amount of risk.

Loss Projection

Projection of the expected losses using state of the art Windstorm Modeling Software (RMS & AIR). This allows underwriters to measure probable loss costs, aggregate capacity and arrive at more competitive outputs.

Program Testing and Optimization / Projected Cost of Risk

We incorporate the loss stratification results into our marketing efforts to guide the underwriters to the optimum program structure and pricing. The loss picks are incorporated into the various quotes to determine the optimal projected cost of risk for the upcoming policy period.

Customized Reports

We provide wide variety of risk modeling and alternative risk services to the County. Simply stated, this function provides quantitative measurement of the impact of future contingent events. These measurements include the expected value of such events, as well as the volatility associated with the range of potential outcomes. Since the resulting measurements are only as good as the underlying data and assumptions

Alternative Risk Transfer Solutions: Parametric Insurance Solutions

Our firm remains on the cutting edge of alternative risk transfer solutions. In recent years, product innovation and data analytics have expanded the scope of commercial insurance solutions to offer coverage for a wider range of threats, exposures and perils. With its transparent and fast claims payment and ability to offer a payout without actual physical damage to an asset, parametric or index-based solutions are often brought to the table of discussion when covering hard to insure risks. The key differences between traditional indemnity and parametric insurance relate to the payment trigger, recovery, basis risk, claims process, term and structure. Fundamentally, parametric (or index based) solutions are a type of insurance that covers the probability of a predefined event happening instead of indemnifying actual loss incurred. It is an agreement to make a payment upon the occurrence of a triggering event, and as such is detached of an underlying physical asset or piece of infrastructure. A suitable parameter or index is any objective measure that is correlated to a specific risk and ultimately to a financial loss for the insured. This is a "measurable index" related to a "scenario". Any parameter or index that is used as the basis for a parametric solution must be objective (i.e. independently verifiable), transparent, and consistent. Generally, we are looking for indices that are easily measurable and reported quickly and effectively to ensure prompt pay out. Important is that neither the risk taker nor the insured are able to influence the event or its reporting to avoid moral hazard. This is why indices around weather and "Acts of God" are so popular in parametric insurance.

Some examples of agencies and respective parameters or indices:

- Singapore National Environmental Agency (NEA) Pollutant Standard Index (PSI)
- Hong Kong Observatory (HKO) typhoon warning signals
- Japan Meteorological Agency (JMA) seismic intensity
- US Geological Survey (USGS) earthquake magnitude
- Australian Bureau of Meteorology (BoM) tropical cyclone category

Traditional insurance versus parametric/index-based covers – what's the difference?

Often, we are asked about the difference between traditional indemnity based insurance versus parametric insurance covers.

An important point to drive here is that parametric insurance solutions are not designed to replace but to complement traditional insurance programs. They can fill the protection gaps left by indemnity insurance like deductibles, excluded perils, scarce capacity or pure financial risks where the insured has no control over the underlying asset – take contingent business interruption for example.

2. The effectiveness of the proposed broker services and how such effectiveness is measured.

At McGriff, we view ourselves as an extension to our clients' Risk Management Department. We believe that in order to obtain the best overall results for our clients we must first start with a plan that identifies the County's short term and long term Risk Management goals. We remain in frequent contact with our clients to address pending issues, generate current risk datapoints and establish long-term strategy. This process of regular communication and information flow allows the County Risk Management Department and our team to track our progress and the effectiveness of our efforts.

In addition, we will also track the overall *Total Cost of Risk* for the County in order to quantify the effectiveness of the insurance/risk transfer solution. We conduct a "5-Year TCOR" analysis in order to determine trends and inefficiencies. These results allow us to identify the most efficient risk transfer thresholds for the County and allow for more informed risk transfer decisions going forward.

3. Any unique services or special expertise your brokerage firm offers that might bring value and/or efficiency to the County.

We firmly believe we bring more County specialization and expertise to Fort Bend County than any other provider.

Servicing Fort Bend County's Insurance & Risk Management needs is a privilege that must be earned through exceptional service performance. We believe that the firm handling the County's program should provide much broader service than simply delivering an insurance policy. A large organization with limited internal administrative resources must rely heavily on additional support services from your Insurance and Risk Management partners. McGriff will continue to provide Fort Bend County with service well beyond the other players in the insurance market, such as:

- **Claims Management:** In your greatest time of need, we are on the ground with you, coordinating the entire process with remediation contractors, insurance claims adjusters, and other vendors. Our clients that worked through Harvey recovery will confirm the integral role that we played since Day 1. Examples of our Harvey performance include The City of Houston, Harris County, Kingwood/Humble ISD, Cy-Fair ISD, Houston Community College and 57 other Texas school districts and public entities that sustained storm damage. We don't just report the claim; we actively support your staff and vendors until your claim is concluded.

- **Preferred Adjuster Assignment:** Before the claim occurs, we introduce our clients to a panel of preferred claims adjusters and allow them to choose the one they like. We then negotiate with the insurers to designate Fort Bend County's preferred adjuster on any loss. This proactive approach ensures a smooth claims handling process with a reasonable adjuster who is working with us and not against us.
- **Claims Preparation Services:** Large claims can become overwhelming to any large organization. The coordination of contractor estimates, building consultant reviews, engineering reports and the ongoing management of "Open Items" represent a tremendous burden on the Risk Manager, Business Officers and Facilities Department. Our team of Claims Management Specialists manages this process until conclusion.
- **FEMA Claims Support Services:** Our panel of experienced FEMA Claim Preparation experts specializes in serving non-profit organizations and can absorb much of the workload currently performed by internal Fort Bend County staff.
- **Market Clout & Direct Access:** McGriff Houston places far more premium volume for coastal counties than any other firm. Our clients benefit from this premium volume through lower premium rates and broader coverage. Additionally, we are one of the few firms with direct access to key markets. Many of our competitors lack these direct access channels and underwriter clout, which creates inflated cost and poor claims outcomes for Fort Bend County.
- **Loss Control:** Loss Control Services, inclusive of safety and loss prevention, are provided in the context of the overall service plan and will be developed with direct input and collaboration with Fort Bend County's Risk Management team. McGriff's extensive experience in designing, planning, developing and implementing complex risk management and safety programs will add value to Fort Bend County in the prevention of losses.
- **Analytics:** McGriff's analytic services can help Fort Bend County's risk management staff by providing quantitative measurement of the impact of future events. These measurements include the expected value of such events, as well as the volatility associated with the range of potential outcomes.
- **Specialization in Public Entities:** We serve more Public Entities in the Greater Houston area and in the State than any other broker service provider. Fort Bend County will benefit from our specialization in Public Entity risk management.

Tab 4 Proposed Pricing/Costs/Fees

The fee-based proposal shall set forth a flat annual fee to provide all the Standard Services without collecting a commission from any insurance companies or, if commissions or contingent type fees are required by the insurance companies, returning such commission or fees to the County.

The service fee portion of your proposal must identify any other charges that would, or could, be billed in connection with the insurance brokerage and consulting services to be provided.

We are proposing an annual service fee of \$86,000. This fee is inclusive of all services mentioned in the RFP.

• Vendor Information

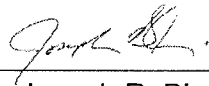


COUNTY PURCHASING AGENT
Fort Bend County, Texas

Vendor Information

Jaime Kovar
Purchasing Agent

Office (281) 341-8640

Legal Company Name (top line of W9)	McGriff Insurance Services, LLC												
Business Name (if different from legal name)													
Type of Business	☒ Corporation/LLC ☐ Sole Proprietor/Individual	☐ Partnership ☐ Tax Exempt	Age in Business? 100+										
Federal ID # or S.S. #	56-1623293	SAM.gov Unique Entity ID #											
SAM.gov CAGE / NCAGE													
Publicly Traded Business	☐ No ☒ Yes Ticker Symbol (NYSE: TFC)												
Remittance Address	10100 Katy Freeway, Ste. 400												
City/State/Zip	Houston, TX 77043-5272												
Physical Address	10100 Katy Freeway, Ste. 400												
City/State/Zip	Houston, TX 77043-5272												
Phone Number	(713) 877-8975												
E-mail	jblasi@mcgriff.com												
Contact Person	Joseph R. Blasi												
Check all that apply to the company listed above and provide certification number.	DBE-Disadvantaged Business Enterprise ☐ SBE-Small Business Enterprise ☐ HUB-Texas Historically Underutilized Business ☐ WBE-Women's Business Enterprise ☐	Certification # _____ Certification # _____ Certification # _____ Certification # _____	<table border="1"> <thead> <tr> <th>Cert Date</th> <th>Exp Date</th> </tr> </thead> <tbody> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> </tbody> </table>	Cert Date	Exp Date	_____	_____	_____	_____	_____	_____	_____	_____
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Company's gross annual receipts	<table border="1"> <tr> <td><\$500,000 _____</td> <td>\$500,000-\$4,999,999 _____</td> </tr> <tr> <td>\$5,000,000-\$16,999,999 _____</td> <td> \$17,000,000-\$22,399,999 _____ >\$22,400,000 ☒ </td> </tr> </table>			<\$500,000 _____	\$500,000-\$4,999,999 _____	\$5,000,000-\$16,999,999 _____	\$17,000,000-\$22,399,999 _____ >\$22,400,000 ☒						
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NAICs codes (Please enter all that apply)	524210												
Signature of Authorized Representative													
Printed Name	Joseph R. Blasi												
Title	Senior Executive Vice President												
Date	December 18, 2023												

THIS FORM MUST BE SUBMITTED WITH THE SOLICITATION RESPONSE

- W9 form

Form W-9 (Rev. October 2018) Department of the Treasury Internal Revenue Service	Request for Taxpayer Identification Number and Certification ▶ Go to www.irs.gov/FormW9 for instructions and the latest information.	Give Form to the requester. Do not send to the IRS.
1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Truist Insurance Holdings, LLC		
2 Business name/disregarded entity name, if different from above McGriff Insurance Services, LLC (EIN: 56-1623293)		
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate ☒ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ P Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. ☐ Other (see instructions) ▶ 4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ (Applies to accounts maintained outside the U.S.)		
5 Address (number, street, and apt. or suite no.) See instructions. 214 N Tryon Street 6 City, state, and ZIP code Charlotte, NC 28202 7 List account number(s) here (optional)		Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)
 Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.
Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number 	or Employer identification number 31-1746517
--	---

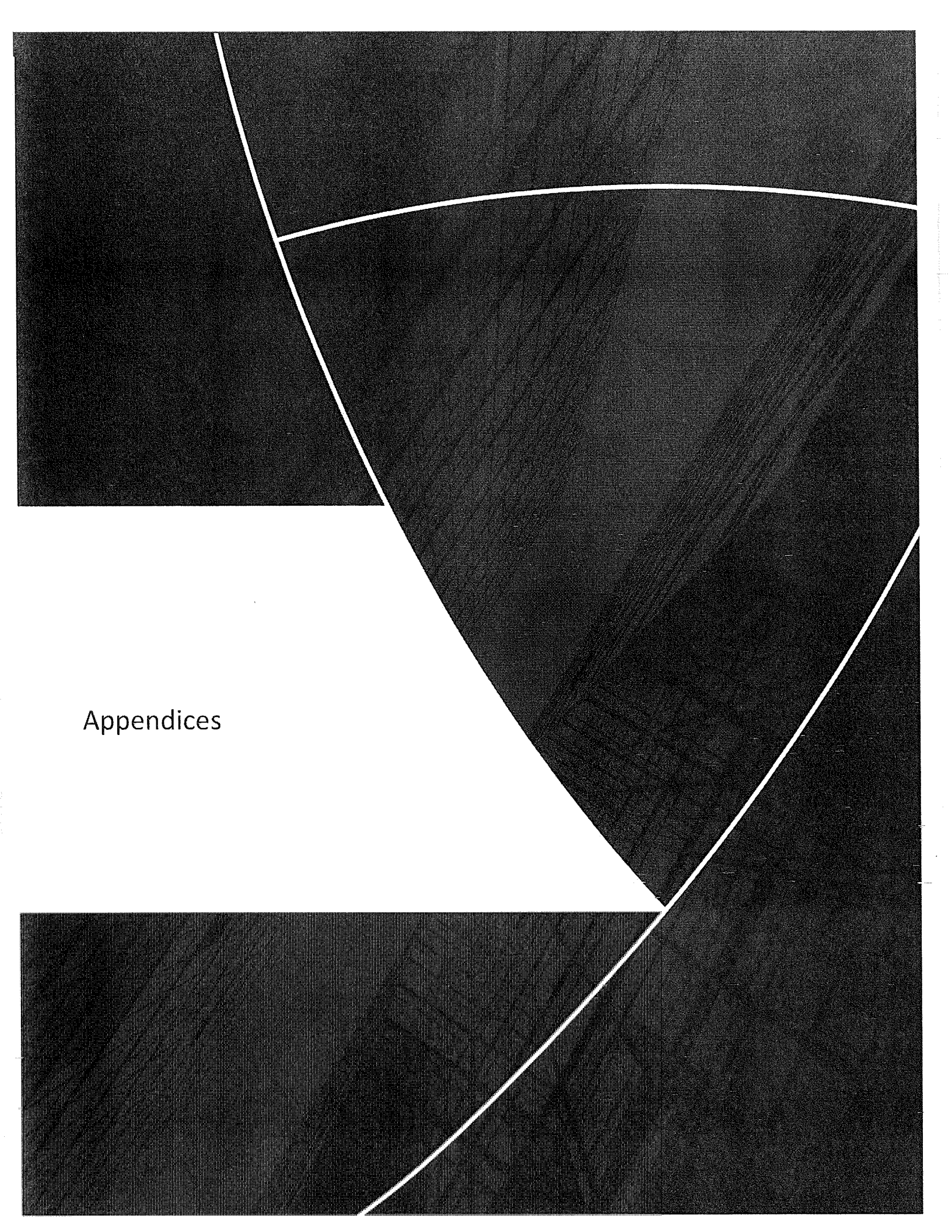
Part II Certification
 Under penalties of perjury, I certify that:
 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
 3. I am a U.S. citizen or other U.S. person (defined below); and
 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.
Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶ <i>Matthew R. Brown</i>	Date ▶ 3/3/2023
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General Instructions
 Section references are to the Internal Revenue Code unless otherwise noted.
Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.
Purpose of Form
 An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

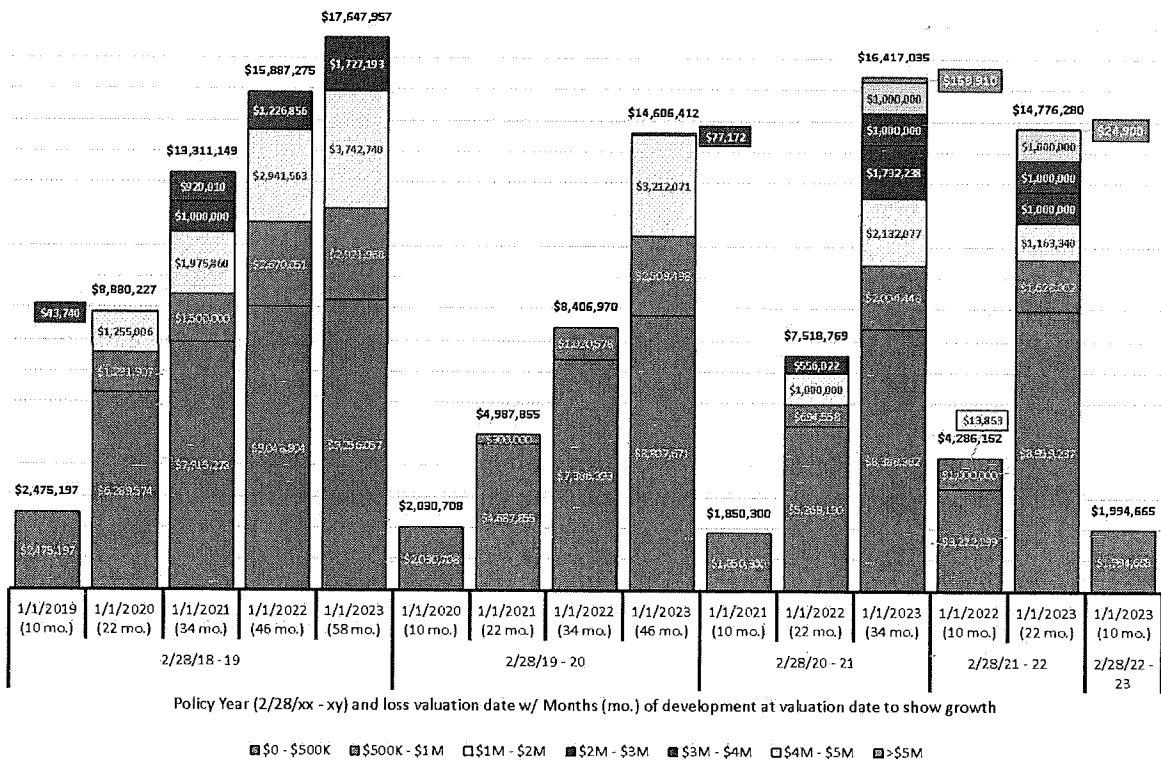
 Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.
If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

An abstract geometric design featuring a large black area on the right and top, and a white area on the left and bottom. A white curved line separates the black and white regions, and a straight white line runs diagonally across the bottom right.

Appendices

Appendix A – Sample Analytics

Sample: Auto Liability Cost Growth Overview
Data: Auto Liability Losses by Policy Year at sequential 1/1/xx valuation dates





Sample's Auto Liability Loss Retention / Transfer Analysis - Cost Analysis (Total from ground up and by layer)
Data: Losses as of 12/22/22 - excludes \$0 Claims

TOTAL Claim Cost		Retention: Loss Limited to...						Transfer: Loss Excess of...					
Policy Year	Total Incurred	\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000	\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000
2/28/16 - 2/28/17	\$15,906,567	\$6,664,795	\$8,903,323	\$11,029,791	\$13,007,833	\$14,007,833	\$15,007,833	\$9,241,773	\$7,003,245	\$4,876,776	\$2,898,734	\$1,898,734	\$898,734
2/28/17 - 2/28/18	\$6,945,814	\$6,019,795	\$6,943,793	\$6,945,814	\$6,945,814	\$6,945,814	\$6,945,814	\$925,019	\$2,021	\$0	\$0	\$0	\$0
2/28/18 - 2/28/19	\$17,672,466	\$9,280,565	\$12,202,534	\$15,945,273	\$17,672,466	\$17,672,466	\$17,672,466	\$8,391,901	\$5,463,932	\$1,727,198	\$0	\$0	\$0
2/28/19 - 2/28/20	\$14,606,232	\$8,807,671	\$11,317,169	\$14,529,240	\$14,606,232	\$14,606,232	\$14,606,232	\$5,798,560	\$3,289,062	\$76,992	\$0	\$0	\$0
2/28/20 - 2/28/21	\$16,418,104	\$8,389,431	\$10,393,879	\$12,525,966	\$14,258,194	\$15,258,194	\$16,258,194	\$8,028,673	\$6,024,225	\$3,892,148	\$2,159,910	\$1,159,910	\$159,910
2/28/21 - 2/28/22	\$14,806,280	\$8,989,237	\$10,618,039	\$11,781,379	\$12,781,379	\$13,781,379	\$14,781,379	\$5,817,042	\$4,188,240	\$3,024,900	\$2,024,900	\$1,024,900	\$24,900
2/28/22 - 2/28/23	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	\$88,319,117	\$50,115,149	\$62,342,301	\$74,721,108	\$81,235,572	\$84,235,572	\$87,235,572	\$38,203,968	\$25,976,726	\$13,598,009	\$7,083,545	\$4,083,545	\$1,083,545

Historical Analysis by Deductible - Excluding Current Year						
Historical Retention %	\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000
	56%	70%	84%	92%	95%	99%
Historical Minimum Retained	\$6,019,795	\$6,943,793	\$6,945,814	\$6,945,814	\$6,945,814	\$6,945,814
Historical Maximum Retained	\$9,280,565	\$12,202,534	\$15,945,273	\$17,672,466	\$17,672,466	\$17,672,466
Historical Average Retained	\$8,025,240	\$10,063,123	\$12,126,242	\$13,211,986	\$13,711,986	\$14,211,986

Cost by Layer		Cost contained within noted layer:					
Policy Year	Total Cost	\$0 - \$500k	\$500k - \$1M	\$1M - \$2M	\$2M - \$3M	\$3M - \$4M	\$4M - \$5M
2/28/16 - 2/28/17	\$15,906,567	\$6,664,795	\$2,238,528	\$2,126,469	\$1,978,042	\$1,000,000	\$1,000,000
2/28/17 - 2/28/18	\$6,945,814	\$6,019,795	\$923,998	\$2,021	\$0	\$0	\$0
2/28/18 - 2/28/19	\$17,672,466	\$9,280,565	\$2,921,968	\$3,742,740	\$1,727,198	\$0	\$0
2/28/19 - 2/28/20	\$14,606,232	\$8,807,671	\$2,509,498	\$3,212,071	\$76,992	\$0	\$0
2/28/20 - 2/28/21	\$16,418,104	\$8,389,431	\$2,004,448	\$2,132,077	\$1,732,238	\$1,000,000	\$1,000,000
2/28/21 - 2/28/22	\$14,806,280	\$8,989,237	\$1,628,802	\$1,163,340	\$1,000,000	\$1,000,000	\$1,000,000
2/28/22 - 2/28/23	\$1,963,654	\$1,963,654	\$0	\$0	\$0	\$0	\$0
TOTAL	\$88,319,117	\$50,115,149	\$12,227,242	\$12,378,718	\$6,514,464	\$3,000,000	\$3,000,000

Historical Cost by Layer Analysis - Excluding Current Year						
Year	\$0 - \$500k	\$500k - \$1M	\$1M - \$2M	\$2M - \$3M	\$3M - \$4M	\$4M - \$5M
2016-2017	\$6,664,795	\$2,238,528	\$2,126,469	\$1,978,042	\$1,000,000	\$1,000,000
2017-2018	\$6,019,795	\$923,998	\$2,021	\$0	\$0	\$0
2018-2019	\$9,280,565	\$2,921,968	\$3,742,740	\$1,727,198	\$0	\$0
2019-2020	\$8,807,671	\$2,509,498	\$3,212,071	\$76,992	\$0	\$0
2020-2021	\$8,389,431	\$2,004,448	\$2,132,077	\$1,732,238	\$1,000,000	\$1,000,000
2021-2022	\$8,989,237	\$1,628,802	\$1,163,340	\$1,000,000	\$1,000,000	\$1,000,000
2022-2023	\$1,963,654	\$0	\$0	\$0	\$0	\$0
Average	\$8,025,240	\$10,063,123	\$12,126,242	\$13,211,986	\$13,711,986	\$14,211,986



Sample Auto Liability Loss Retention / Transfer Analysis - Cost and Claim Count

Data: Losses as of 12/22/22 - excludes \$0 Claims

Claim Cost		Retention: Loss Limited to...							Transfer: Loss Excess of...						
Policy Year	Total Incurred	\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000		\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000	
2/28/16 - 2/28/17	\$15,906,567	\$6,664,735	\$8,903,323	\$11,029,791	\$13,007,833	\$14,007,833	\$15,007,833		\$9,241,773	\$7,003,245	\$4,876,776	\$2,898,734	\$1,898,734	\$898,734	
2/28/17 - 2/28/18	\$6,945,814	\$6,019,735	\$6,943,798	\$6,945,814	\$6,945,814	\$6,945,814	\$6,945,814		\$926,019	\$2,021	\$0	\$0	\$0	\$0	
2/28/18 - 2/28/19	\$17,672,466	\$9,280,505	\$12,202,534	\$15,945,273	\$17,672,466	\$17,672,466	\$17,672,466		\$8,391,901	\$5,469,932	\$1,727,193	\$0	\$0	\$0	
2/28/19 - 2/28/20	\$14,606,232	\$8,807,671	\$11,317,169	\$14,523,240	\$14,606,232	\$14,606,232	\$14,606,232		\$5,798,560	\$3,289,062	\$76,992	\$0	\$0	\$0	
2/28/20 - 2/28/21	\$16,418,104	\$8,383,431	\$10,333,879	\$12,525,356	\$14,258,194	\$15,258,194	\$16,258,194		\$8,028,673	\$6,024,225	\$3,892,148	\$2,159,910	\$1,159,910	\$159,910	
2/28/21 - 2/28/22	\$14,806,280	\$8,983,237	\$10,618,039	\$11,781,379	\$12,781,379	\$13,781,379	\$14,781,379		\$5,817,042	\$4,188,240	\$3,024,900	\$2,024,900	\$1,024,900	\$24,900	
2/28/22 - 2/28/23	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654		\$0	\$0	\$0	\$0	\$0	\$0	
TOTAL	\$88,319,117	\$50,115,149	\$62,347,391	\$74,721,108	\$81,235,572	\$84,235,572	\$87,235,572		\$38,203,968	\$25,976,726	\$13,598,009	\$7,083,545	\$4,083,545	\$1,083,545	

Historical Analysis by Deductible - Excluding Current Year						
Historical Retention %	\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000
Historical Minimum Retained	56%	70%	84%	92%	95%	99%
Historical Minimum Retained	\$6,019,795	\$6,943,793	\$6,945,814	\$6,945,814	\$6,945,814	\$6,945,814
Historical Maximum Retained	\$9,280,505	\$12,202,534	\$15,945,273	\$17,672,466	\$17,672,466	\$17,672,466
Historical Average Retained	\$8,025,240	\$10,063,123	\$12,126,242	\$13,211,986	\$13,711,986	\$14,211,986

Claim Count		Count: Claims at or below...							Count: Claims in Excess of...						
Policy Year	Total Count	\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000		\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000	
2/28/16 - 2/28/17	165	160	161	163	164	164	164		5	4	2	1	1	1	
2/28/17 - 2/28/18	176	171	175	176	176	176	176		5	1	0	0	0	0	
2/28/18 - 2/28/19	230	224	225	227	230	230	230		6	5	3	0	0	0	
2/28/19 - 2/28/20	265	259	261	264	265	265	265		6	4	1	0	0	0	
2/28/20 - 2/28/21	161	156	157	159	160	160	160		5	4	2	1	1	1	
2/28/21 - 2/28/22	207	202	204	206	206	206	206		5	3	1	1	1	1	
2/28/22 - 2/28/23	155	155	155	155	155	155	155		0	0	0	0	0	0	
TOTAL	1,359	1,327	1,338	1,350	1,356	1,356	1,356		32	21	9	3	3	3	



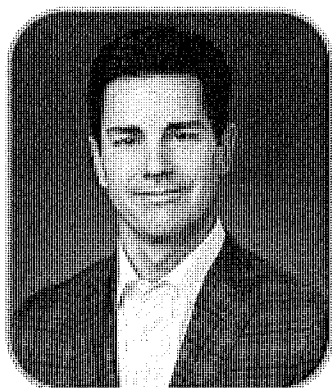
Sample: Auto Liability Detail Overview
Data: Cost and Count overview, with detail of claims in excess of \$100,000 (including % of total contribution)
Data: Losses as of 12/22/22 - excludes \$0 claims

Total Cost and Count by Policy Year		2/20/16 - 2/20/17	2/20/17 - 2/20/18	2/20/18 - 2/20/19	2/20/19 - 2/20/20	2/20/20 - 2/20/21	2/20/21 - 2/20/22	2/20/22 - 2/20/23
		Total Incurred Cost	Total Incurred Cost	Total Incurred Cost	Total Incurred Cost	Total Incurred Cost	Total Incurred Cost	Total Incurred Cost
	Total Claim Count	165	176	230	265	161	207	155
Claims with Incurred Cost under \$100,000	Incurred Cost	\$2,118,515	\$2,316,818	\$2,571,145	\$3,391,267	\$2,479,452	\$2,917,080	\$1,811,142
	Claim Count	151	164	207	248	138	186	154
Claims with Incurred Cost over \$100,000	Incurred Cost	\$13,788,052	\$4,628,996	\$15,101,321	\$11,214,965	\$13,938,653	\$11,889,200	\$152,512
	Claim Count	14	12	23	17	23	21	1
% Contribution of Claims w/ cost over \$100,000.	Cost - % of total	86.7%	66.6%	85.5%	76.8%	84.9%	80.3%	7.8%
	Count - % of total	8.5%	6.8%	10.0%	6.4%	14.3%	10.1%	0.6%

CLOSED Cost Detail: Total Incurred Cost of claims over \$100,000. Ranked in descending order of severity. NOTE: Claims between \$100,000 and \$1,000,000 are classified as "Closed" claims and are not included in this report.	\$5,898,734	\$1,002,021	\$2,063,982	\$2,076,592	\$5,159,910	\$5,024,900
	\$1,009,571	\$695,429	\$2,708,059	\$1,993,330	\$235,000	\$410,154
	\$1,036,897	\$678,330	\$2,055,151	\$863,891	\$200,061	\$265,507
	\$738,528	\$545,701	\$1,529,387	\$645,607	\$198,367	\$160,028
	\$319,809	\$504,537	\$1,213,353	\$287,749	\$168,346	\$160,028
	\$305,002	\$331,636	\$924,968	\$255,238	\$139,746	\$138,275
	\$270,120	\$227,427	\$351,921	\$180,792	\$151,167	\$107,507
	\$245,442	\$171,065	\$126,075	\$140,948	\$108,992	
	\$241,632	\$141,036	\$291,165	\$136,760	\$109,491	
	\$183,842	\$148,202	\$259,699	\$118,876		
	\$178,199	\$109,977	\$249,313	\$114,017		
	\$160,805	\$102,844	\$247,560			
	\$159,188		\$201,402			
			\$178,557			
			\$177,832			
			\$163,317			
			\$138,762			
			\$137,310			
			\$117,562			
			\$115,000			

OPEN Cost Detail: Total Incurred Cost of claims over \$100,000. Ranked in descending order of severity.	\$2,978,842	\$1,612,740	\$2,732,230	\$1,061,927	\$152,512
		\$1,605,083	\$1,004,020	\$1,081,413	
		\$350,000	\$1,046,057	\$603,552	
		\$331,504	\$504,448	\$525,250	
		\$292,175	\$497,081	\$335,320	
		\$241,124	\$340,226	\$309,847	
			\$251,313	\$279,478	
			\$179,086	\$276,011	
			\$175,795	\$252,363	
			\$173,879	\$249,837	
			\$159,882	\$200,750	
			\$125,836	\$185,319	
			\$113,612	\$132,760	
			\$114,717	\$108,962	

Appendix B – Resumes



Joseph R. Blasi, CPCU, ARM

Senior Executive Vice President / Account Manager

Houston, TX

713-940-6565

jblasi@mcgriff.com

Years of Experience: Since 1993 **Years with McGriff:** Since 1997

Education

Bachelor of Business Administration in Finance, University of St. Thomas (Summa Cum Laude)

CNA Technical Insurance School

Licenses/Certifications

Associate in Risk Management (Insurance Institute of America)

Chartered Property & Casualty Underwriter (American Institute for CPCU)

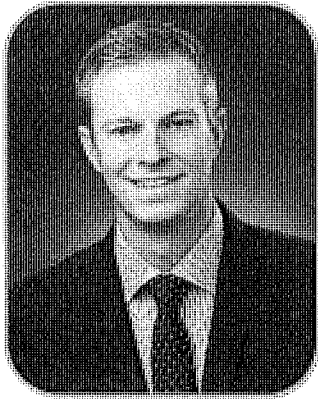
Licensed Risk Manager (Texas Department of Insurance)

Areas of Expertise

- Government & Public Entities
- Educational Institutions
- Catastrophic Property Insurance Placements
- Alternative Risk Financing Programs, Including:
- Retrospective Rating Programs
- All Lines Basket Aggregate Programs
- Collateralized Deductible Programs
- Captives (Heterogeneous And Homogenous Groups)
- Professional Liability Exposures
- Third Party Claims Administration Programs
- Construction Insurance Programs
- Risk Sharing Pools
- Owner Controlled Insurance Programs

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McGriff Insurance Services, LLC



Ben Odom, CSRM

Senior Vice President

Houston, TX

713-273-2606

bodom@mcgriff.com

Years of Experience: Since 2010 Years with McGriff: Since 2014

Education

BBA, Risk Management/Insurance, St. Mary's University

BBA, Finance, St. Mary's University

MBA, St. Mary's University

Licenses/Certifications

Certified School Risk Manager

Underwriting Professional Development Program

General Agents License

Various Non-Resident Licenses

Areas of Expertise

- Government & Public Entities
- Educational Institutions
- Catastrophic Property Insurance Placements
- Alternative Risk Financing Programs
- Underwriting Analysis
- Risk Analysis
- Collateralized Deductible Programs
- Exposure/Control Analysis
- Professional Liability Exposures
- Third Party Claims Administration Programs
- Rate Justification Analysis
- Risk Sharing Pools
- Owner Controlled Insurance Programs
- Claim Handling



Olga Saenz

Senior Vice President / Marketing Account Executive
Houston, TX

713-402-1475

osaenz@mcgriff.com

Years of Experience: Since 1992 Years with McGriff: Since 2002

Education

University of Houston

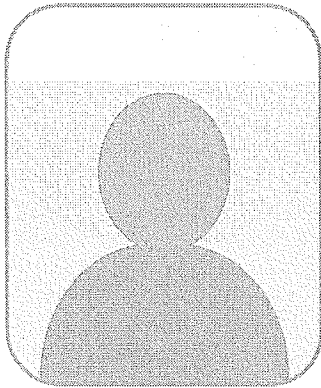
Licenses/Certifications

General Agent License, TX

Surplus Lines License, TX

Areas of Expertise

- Design & placement of commercial insurance programs
- Public Entities/Municipalities, School Districts, Higher Education
- Large Property Schedules / High Concentration of CAT Schedules
- Property Owners – Habitational & Retails Risks
- Nursing / Assisted / Senior Living Facilities
- Builders Risk Programs



Sandye Sims, CPCU, CIC, CRM

Senior Vice President / Marketing Account Executive

Houston, TX

713-940-6584

ssims@mcgriff.com

Years of Experience: Since 1978

Years with McGriff: Since 1996

Education

Austin Community College

Licenses/Certifications

CPCU (Chartered Property Casualty Underwriter)

CIC (Certified Insurance Counselor)

CRM (Certified Risk Manager)

General Lines Agent- Property & Casualty;

Surplus Lines Agent

Areas of Expertise

- Marketing and account servicing of large commercial Property and Casualty accounts, including:
- Construction
- Non-Marine Energy
- Manufacturing
- Wholesale / Retail
- Large deductible/loss sensitive Casualty programs
- Due Diligence/Coverage Reviews



Diana Smetters

Account Manager

Houston, TX

713-940-6596

dsmetters

Years of Experience: Since 1994 Years with McGriff: Since 2012

Licenses/Certifications

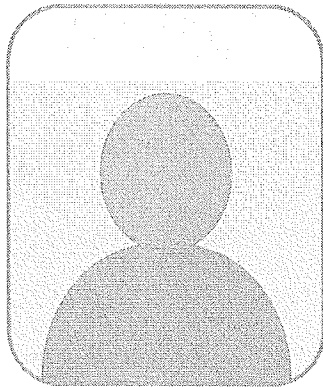
General Agents License – Texas

CRIS Designation (Construction Risk Insurance Specialist)

Areas of Expertise

Experienced in handling large accounts with extensive Property and Automobile exposures.

- Public entities, school districts
- Nursing homes
- Construction/Contracting Risks
- Large property schedules



Shelly Kirkham

Client Service Specialist

Houston, TX

713-273-2648

skirkham@mcgriff.com

Years of Experience: Since 2016 Years with McGriff: Since 2016

Education

Attended College of the Desert 2005-2007

Licenses/Certifications

General Agents License, Texas

Areas of Expertise

- Account Administration: Assist ASR with daily servicing of client needs including addition and deletion of locations, vehicles, accounting, issuing Certificate of Insurance.
- Property & Casualty Accounts



Ben Vansant

Loss Control Engineer

Houston, TX

713-940-6589 | 832-499-5581

bvansant@mcgriff.com

Years of Experience: Since 2013 Years with McGriff: Since 2018

Education

Bachelor of Science, University of Texas at Austin

Licenses/Certifications

Chartered Property Casualty Underwriter (CPCU)

Associate in Risk Management (ARM)

Associate Safety Professional (ASP)

Areas of Expertise

- Risk control service delivery for large commercial casualty accounts, including:
Construction, Manufacturing, Hospitality industries
- Controlled insurance programs/Wrap-Ups
- Safety program development
- Facility and site audits/inspections
- Accident/loss investigations
- Fleet management
- Loss trend analysis



Frank DeLeon

Senior Vice President

Houston, TX

713-402-1420

fdeleon@mcgriff.com

Years of Experience: Since 1984 Years with McGriff: Since 2007

Education

B.B.A., Finance, Texas State University, 1983

Licenses/Certifications

Multi-Lines Insurance Adjuster (17-08)

General Agents License, Texas

Areas of Expertise

- Risk Management
- Claims Analysis
- Due Diligence
- Policy Development/Implementation
- Cost Containment
- TPA Oversight & Vendor Management/Relations
- Account Management
- Training and Supervision
- General Management
- Bilingual Spanish



Debra Taylor

Vice President

Houston, TX

713-273-2679

dtaylor@mcgriff.com

Years of Experience: Since 2008 Years with McGriff: Since 2008

Education

Associate Degree in Office Education

Licenses/Certifications

All Lines Adjuster

Certified Insurance Service Representative

Certified School Risk Manager

Areas of Expertise

- Claims Administration
- Document Reconciliation
- Claims Procedural Documentation
- Loss Runs Report Analysis



Chad Williamson

Vice President, Executive Risk Advisors

Houston, TX

713-940-6548 | 832-918-1768

cwilliamson@mcgriff.com

Years of Experience: Since 2005 Years with McGriff: Since 2014

Education

Bachelor of Business Administration, Texas Tech University

Licenses/Certifications

Registered Professional Liability Underwriter Designation (RPLU)

Areas of Expertise

- Executive Risk Advisors
 - Directors & Officers Liability
 - Fiduciary Liability
 - Employment Practices
 - Liability
 - Professional/Errors & Omissions Liability
 - Commercial Crime
 - Special Crime
 - Cyber and Privacy Coverage



Tom Bradt

Senior Vice President

Houston, TX

713-940-6500

tbradt@mcgriff.com

Years of Experience: Since 2010 Years with McGriff: Since 2010

Education

Bachelor of Business Administration in Finance, University of Houston

Licenses/Certifications

General Agent License, TX

Certified Risk Manager (CRM)

Associate in Risk Management (ARM)

Certified Insurance Counselor (CIC)

Areas of Expertise

- Loss data analysis for customized reports
- Risk retention analysis and program structure testing
- Auditing NCCI Experience Modifiers
- Evaluation and negotiation of legacy program adjustments
- Calculating and negotiating collateral requirements
- Cost of Risk assessments
- Developing customized analytical tools to meet specific needs



Michael Ortega

Vice President

Houston, TX

713-273-2603

mortega@mcgriff.com

Years of Experience: Since 2014 Years with McGriff: Since 2014

Education

B.B.A. Finance – Barry University, 2013

Areas of Expertise

- Experience Modifier Rating
- Analyses of loss data
- Risk retention analysis and program structure testing
- Calculating and negotiating collateral requirements
- Cost of Risk reports
- Customized analytical reports

Appendix C - Addendums



Appendix D - Our Service Philosophy

Our philosophy on client service rests heavily on McGriff's rich experience, proactive engagement, and the consistency to deliver innovative and client-focused solutions. This approach empowers our clients to conduct their business responsibilities and fulfill similar obligations to their customers.

Our teammates.

McGriff is committed to hiring, developing, and retaining the best and brightest people within our industry. We place an emphasis on hiring individuals that are experienced in the niche industries on which we focus. Our goal is to provide our customers with the highest level of professionalism, creative thinking, and service available.

Our leadership.

Our senior management maintains hands-on involvement with account service activities to ensure the highest level of service and responsiveness. Regardless of what leadership level they have obtained, all of our teammates are first and foremost in the risk and insurance business.

Our structure.

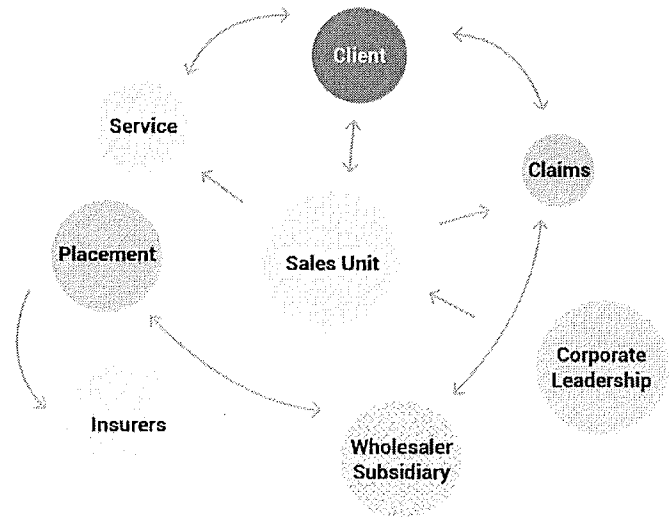
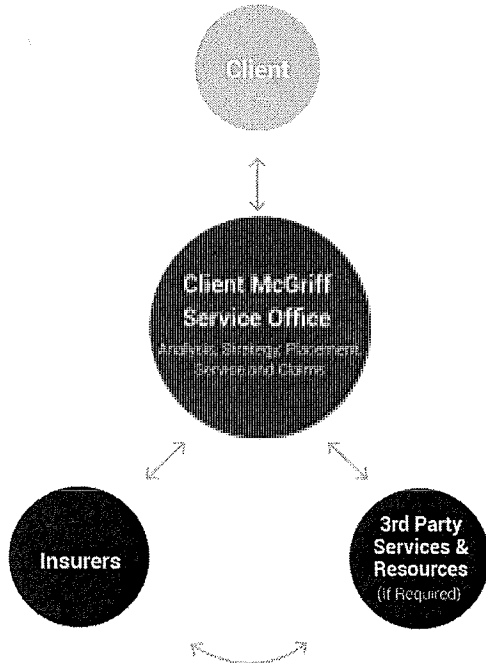
McGriff's organizational structure supports its client-centered approach to doing business. We are a flat organization that operates with minimum bureaucracy -- each team is uniquely positioned to respond immediately to customer requests.

Our work product.

Our focus on the customer enables us to provide solutions that are as unique as each of our clients. From comprehensive program design to alternative risk transfer mechanisms, we provide the solution that is the best fit for each client. Throughout the consulting engagement, we never lose sight of who we are working for and continually search for ways to improve and deepen our product and service offerings.

Appendix E - Our Service Model

The entire McGriff organization is built around servicing client needs. Our approach to servicing our clients is not a fragmented approach, but a team approach that personally takes responsibility for all facets of our clients' needs.



McGriff's Specialized, Service-Oriented Approach

- Niche-focused Account Service Team centrally located and multi-disciplined
- All team members accountable and involved in day-to-day service functions; 24/7 availability
- Strong team dynamic; close-knit group. Long-term continuity & extremely low turnover
- Model promotes creativity, expertise and specialized solutions; provides most direct access to insurance market
- Model drives innovation, automation, efficiency and data analytics to assist companies achieve their risk goals and objectives.
- Corporate leadership fully integrated into service
- Dedicated claims team

Conventional Broker Service Model

- Lack of specialization held by Account Managers
- Multiple points of contact, limited ownership
- Separation of day-to-day service functions; lack of continuity in reporting lines
- Corporate leadership isolated from the service process
- Structured for large volume, standardized business; but not highly specialized / customized solutions



Visit McGriff.com.

McGriff Insurance Services, LLC.

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Houston, Texas 77043

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