



SERVICES AND QUALIFICATIONS



Areas of Expertise

- Analyze insurance programs of target companies and identify coverage issues and premium savings.
- Establish “platform” programs for specific insurance programs such as directors and officers liability, umbrella liability, and property.
- Establish premium deferral agreements with insurers for companies that are embarking on a growth strategy via acquisitions.



Areas of Expertise

- Analyze and recommend the structure of insurance coverage for companies that move from a consolidated program to separate stand alone programs.
- Negotiated loss portfolio transfers of claims from acquired companies to non-affiliated insurance companies.
- Negotiate service agreements with brokers and third party claim administrators.
- Negotiate collateral requirements for loss sensitive programs.
- Develop strategies for initial insurance placements for IPOs



Areas of Expense Reduction

- Insurance premiums and administrative costs
- Retained (planned) losses
- Vendor compensation
 - Carriers/Brokers/TPAs
- Internal expense
 - Management/Administration/Claims/Processes



Target Client Profile

- Insurance expense in excess of \$500k(less if a start-up)
- Aggressively looking to reduce costs
- Experienced significant growth or reduction in size
- Change in Senior Management
- Absence of, or understaffed risk management department
- Desire for innovative risk transfer and financing alternatives



Mergers & Acquisition Experience

- Equity Firms
 - Apollo Management, LP
 - Ironwood Cap, LP
 - KRG Capital, LP
 - Texas Pacific, LP
- Corporate Clients
 - Astellas US, LLC
 - Honeywell International
 - HD Supply, Inc.
 - Interior Specialists, Inc.
 - Simonds International, Inc.
 - TechTarget, Inc(IPO)



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