

## Superior Partners. Superior Results.

Superior Insurance Partners is a growing insurance brokerage platform that partners with, invests in, and supports leading insurance brokerages. As our partner, you maintain your independence and entrepreneurial culture while gaining customized resources to help you achieve your goals faster.



### **Build & Implement a Tailored Plan to Meet Your Needs**

Our transaction and partnership approach is tailored to meet your unique personal and professional goals, allowing you to focus on the most important parts of your business.



### **Maintain Independence and Promote Entrepreneurial Spirit**

You have worked hard to build your business – we won't change your winning formula. We will preserve your independence while giving you significant and customized resources to enhance your business.



### **Maximize & Unlock the Lifetime Value of Your Business**

Our collaborative approach maximizes the total value of your business over multiple transactions in the future.

## About Us

### As an independent insurance broker, you are our sole focus

Superior Insurance Partners is a growing platform that acquires and partners with independent insurance brokerages. At Superior Insurance Partners, our success relies on helping our Agency Partners succeed – it's all about you.

#### Our Mission

**To improve the lives and support the needs of our Agency Partners by providing superior insurance solutions**

#### Our Vision

**Unite leading insurance brokerages within one platform to create more value together**

#### Servant Leadership

Our Agency Partners are our priority – we continually evaluate the best way to serve your near and long term goals.

#### Constant Improvement

We believe great agencies can become even better – we continually evaluate ways to improve resulting in increased performance and profitability.

#### Alignment

All of our Agency Partners are aligned through long term economic incentives.

#### Collaboration

Agency Partners leverage the benefits of best practices, scale, and resources across our shared platform.

#### Independence

Our decentralized structure keeps operating control at the local level and allows our Agency Partners to offer their clients the benefits of a large firm.

## PARTNERSHIP BENEFITS

### Success Through Collaboration

#### Offer more solutions to more clients

Each of our Agency Partners brings unique product expertise and regional focus. Our Agency Partners may collaborate to leverage the power of our platform and expand their client reach and service offerings. By using the resources and relationships of our shared platform, each Agency Partner can better serve their existing clients and more easily win new clients, all while maintaining their entrepreneurial culture.

### A Superior Partnership

#### Tailored partnerships to meet your specific goals

We acquire leading insurance agencies and structure each transaction to meet your operational and financial goals. Our minimally disruptive approach does not change your brand, employee compensation structure, or management – instead, we provide tailored resources so you can achieve your goals faster than you would without a partner.



# Our partnership approach helps independent insurance agencies achieve their goals by providing tailored solutions including:

## Resources

Spend more time with your clients and less time running your business:

- Strategic Network Resources Include:
  - Product Expertise
  - Cross Sell Opportunities & Warm Leads
  - Operational Best Practices
  - Collaboration with Top Business Leaders
- Centralized Operational Resources Include:
  - Finance & Accounting
  - Payroll, HR & Benefits
  - Talent Recruitment
  - Preferred Technology Systems
  - Additional Carrier Markets
  - Service Center



## Growth

For owners seeking to expand their legacy and financially participate in accelerated growth, we offer our Agency Partners:

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  - Product Expertise
  - Cross Sell Opportunities & Warm Leads
  - Operational Best Practices
  - Collaboration with Top Business Leaders
- Centralized Operational Resources Include:
  - Finance & Accounting
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## Succession Planning

We provide attractive liquidity solutions to help with:

- Internal Perpetuation Solutions:
  - Partner buyouts
  - Multi-generational ownership changes
- External Perpetuation Solutions:
  - Provide the best monetary outcome for those seeking the most dollars over a time horizon
- Retirement Planning:
  - Custom solutions for owners looking to retire or slow down in the near or long term and want to maximize value



## Resources Available

**Our centralized business functions allow our Agency Partners to spend less time on administrative and operational tasks and more time with clients**



### Finance & Accounting

Centralized finance, accounting, and tax functions reduce Agency Partners time needs.



### Recruiting

Great people hard to find, and finding them is a full time job! Utilize our dedicated recruiting team to recruit the best talent.



### Carrier Relationships

Great people hard to find, and finding them is a full time job! Utilize our dedicated recruiting team to recruit the best talent.



### Technology

Work more efficiently by leveraging our technology capabilities to make your employees and clients lives easier.



### HR, Benefits & Payroll

Offer more competitive benefits to hire & retain top talent by utilizing our preferred benefits platform. Centralized HR and Payroll functions reduce administrative needs of our Agency Partners.



### Service Center

Reduce time spent on your smallest accounts by optionally leveraging our Service Center.

FOR AGENTS

## Who Can Benefit From a Partnership?

**As a high growth, independent insurance brokerage platform, we offer attractive options to insurance brokerage professionals with varying needs**

### Agency Owners

**Many independent agencies spend too much time on parts of their business that do not directly add value to their clients or the agency.**

- Opportunity to increase earnings, income, and wealth
- Administrative service support
- Recruiting support
- Carrier and product solutions
- Provide product and geographic diversity
- Access to our experienced business management team



## Producers

**As a high growth business, we offer highly attractive producer packages. We also provide you with resources to hit the ground running. Whether it's access to product experts, additional client resources, a larger support team or a faster growth trajectory, Superior Insurance Partners is uniquely equipped to help you succeed.**

- Earn higher commission rates
- Access product line experts to increase close rate
- Leadership opportunities in practice verticals
- We accommodate non-compete agreements



## Retiring Agents

**Many retiring agents have spent a lifetime building a reputable agency. Superior Insurance Partners gives retiring agents an opportunity to monetize value and build a customized succession plan providing team members with stability and customers with ongoing service.**

- Develop a succession plan
- Ensure customers are left in good hands
- Generate liquidity and realize value
- Eliminate ongoing liabilities from closing agency
- Access to flexible capital





## FAQ

# Choosing the right partner is a big decision - we've been there before. Common concerns include:

### What will happen to my agency after the transaction?

We want our Agency Partners to maintain their entrepreneurial culture and local autonomy. We will not change the way you run your business, rebrand you, or change the compensation structure for your team. You have built a successful business and we want to expand upon your winning formula.

### How will joining Superior Insurance Partners benefit my clients?

Superior Insurance Partners is an insurance brokerage platform comprised of leading, regional insurance agencies. Our network of product specialties allows you to offer more markets, expertise, and coverage solutions to best suit your clients' needs.

### What will happen to my employees?

Superior Insurance Partners keeps your existing employee and compensation structure in place. Your employees gain unlimited career potential by being part of growing firm.

### Do I need to continue working after joining?

Before consummating a transaction, we build a tailored plan that meets your needs. Whether you want to continue to run your agency and grow, develop a succession plan, or remain a local agency but gain the benefits of national resources, the plan we create together will allow you to realize your goals.

### What if I am a second generation owner and am comfortable, why should I join Superior Insurance Partners?

Many first generation founders value the ability to work with their children who have taken a leading role in the agency, but ownership transfer can become a challenge. In today's market, often times the second generation does not have the financial resources to pay the fair market value for the first generation's portion of the business. Superior Insurance Partners works with all parties to provide liquidity for founders while allowing the younger generation to continue to grow the family legacy and create additional value, a win-win for all.

### How does joining Superior Insurance Partners maximize the lifetime value of my agency?

Superior Insurance Partners is comprised of leading regional Agency Partners. As each Agency Partner continues to grow organically and through acquisition, all partners benefit from the premium valuation applied to a national, rapidly growing, and diversified insurance brokerage.



## Contact

**We look forward to hearing from you**

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