PLEXUS

STRATEGIC. INSURANCE. SOLUTIONS.

Presentation Title

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Agenda

Divider Slide

Slide Title

Slide Title

Thank You



21805 W. Field Parkway
Suite 300
Deer Park, IL 60010

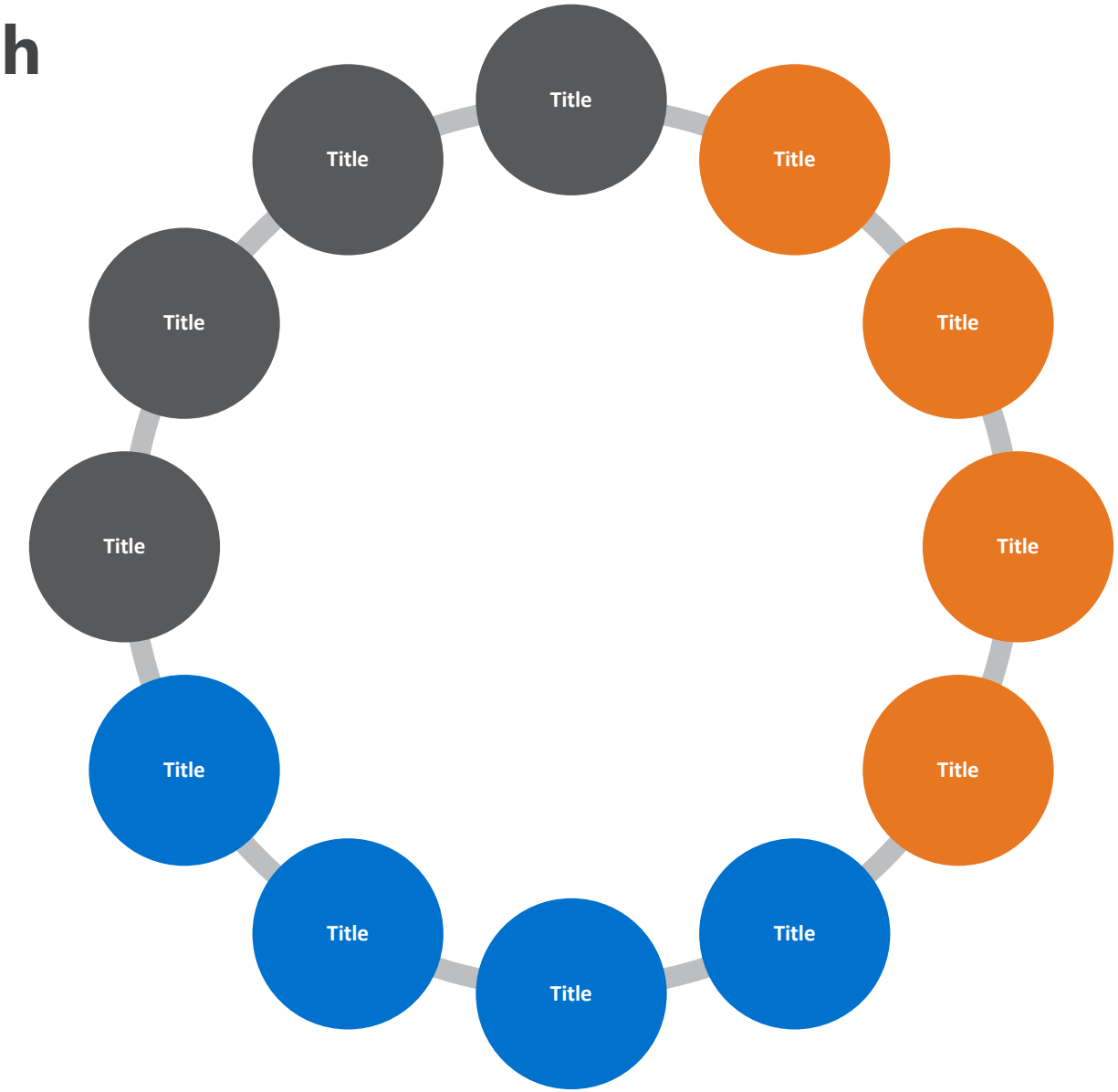
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Service Summary



Plexus Approach



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Your Insurance Risk Partner



The Plexus Groupe is a Top 100 independent insurance advisory firm backed by our knowledgeable team, innovative resources, and our own international network. We offer defined practice specialties in Business Insurance, Employee Benefits, Private Client, Retirement Services and Mergers & Acquisitions.

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About Us

01 | Founded

Founded in 1990 and privately owned.

02 | Nationally Recognized

Respected subject matter experts in insurance broking and risk management.

03 | Top 100

The Plexus Groupe is a Top 100 independent insurance advisory firm.

04 | 150+ Associates

Regional offices located across the country in Park, Chicago, Dallas, Oklahoma City, Tampa, and Memphis.

05 | Carriers

Partner with over 100 insurance carriers.

06 | Network

Plexus Global Network in 120+ countries.

07 | Practices

Employee Benefits, Business Insurance, Private Client, Retirement Plans, and Benefit Administration Technology.



Our Team Structure

Service Team



Full Name
Position Title



Full Name
Position Title



Full Name
Position Title



Lead Consultant
Full Name
Position Title

Lead Consultant
Full Name
Position Title



Professional Services

Full Name
Position Title

Full Name
Position Title

Full Name
Position Title

Full Name
Position Title

Full Name
Position Title

Full Name
Position Title

Meet The Team



Full Name
Position Title

- Oversee client relationship
- Strategic benefit plan advisor
- Develop and execute benefit plan strategy
- Analyze plan data for savings opportunities
- Ensure Cozzini Brothers has all TPG resources needed to achieve success
- Oversee financial performance
- Ensure overall client satisfaction



Full Name
Position Title

- Manage the client service team and the client relationship
- Develop and execute strategic benefit plan
- Analyze/optimize plans for savings opportunities
- Renewal management and vendor negotiations
- Coordinate open enrollment and technology implementation
- Employee communication strategy development
- Wellness strategy assistance
- Financial and administrative performance management



Full Name
Position Title

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- Develop and execute benefit plan strategy
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Our Team Structure



Full Name

Position Title

Mitchell Andrews began his insurance career over 30 years ago as a field underwriter, where he met his current business partner at The Plexus Groupe. As a partner at Plexus, Mitchell's role is to help clients understand their current/potential cost drivers, and to provide solutions to keep them as low as possible. From there, Mitchell works to provide the appropriate resources from within the firm to execute the agreed strategies and ensure Plexus is exceeding the needs of its clients. Mitchell graduated from the University of Colorado with degrees in Finance and Logistics. Additionally, he serves on several industry boards/advisory groups and is an active board member of the American Cancer Society, and the American Red Cross.



Full Name

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Slide Title

the right strategy to achieve their “cost/culture continuum”, Plexus will ask many questions to better understand and evaluate your data, provide comprehensive timelines, and provide ROI metrics. Our nimble nature allows us to design the right team to build the success you desire.

Define issues, options, timeline delivery

Budget clarity within culture/cost continuum

Short-and long-term priorities/timelines

Clarity of ROI and outcome measures









Assurex Global Network



$47B+
Annual Premium

$5B+
Annual Revenue

100+
Partner Firms

$730+
Partner Offices

$47B+
Employees

175
Countries

= Assurex Global territories

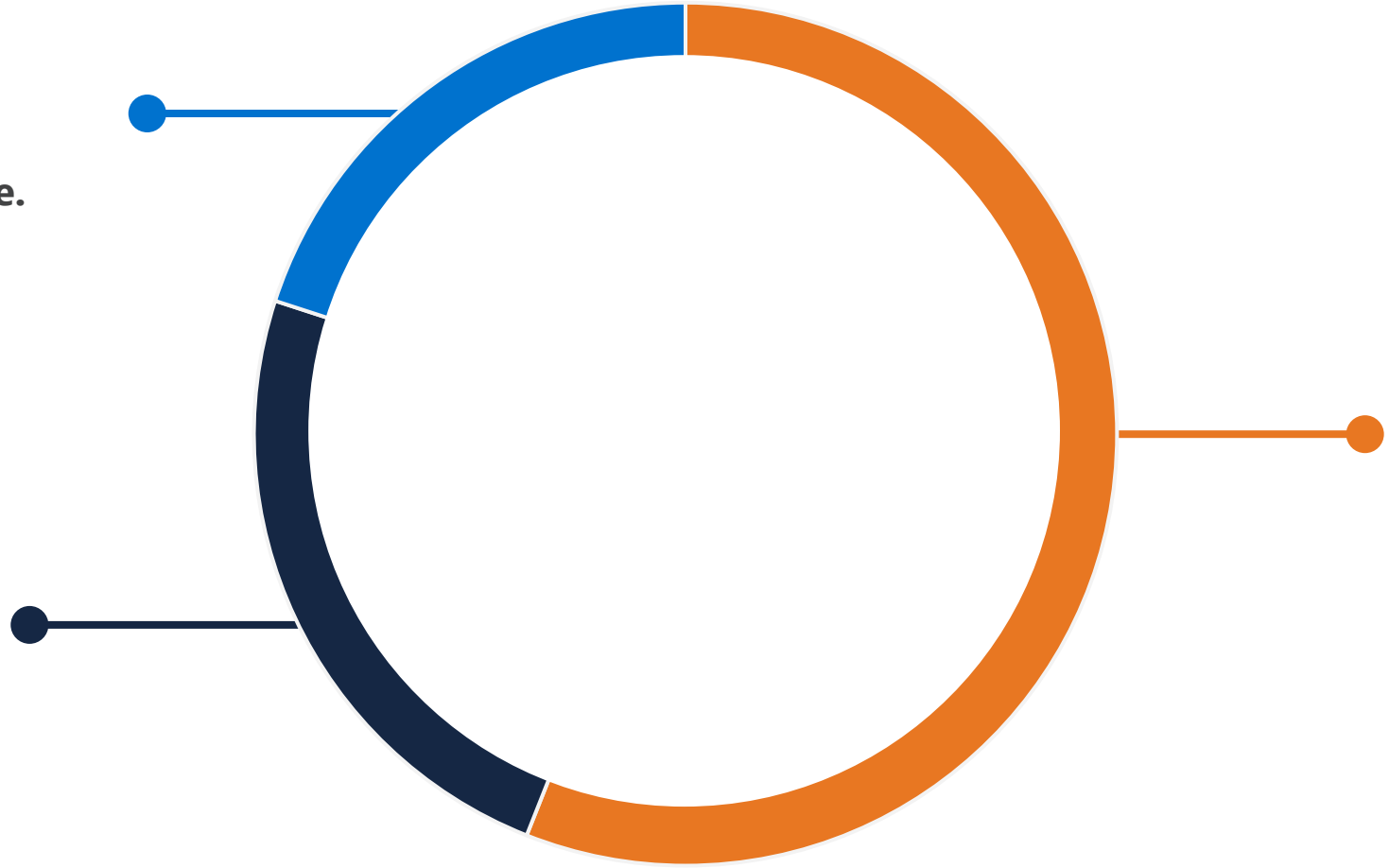
= Non-Assurex Global agreement territories

= Sanctioned territories (Iran, North Korea & Russia)

Our Evaluation Process

20%

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56%

Lorem ipsum dolor sit amet, porttitor congue.

24%

Lorem ipsum dolor sit amet, porttitor congue.

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People First
We prioritize relationships over revenue.

Focus
We focus on value, service and lasting partnerships.

Authentic Leadership
We provide stewardship and strategy established with integrity.

Team Approach
We embrace an environment of accountability, transparency and innovation.

Straight Talk
We believe direct communication is the highest form of respect.



> **“Our passion is providing solutions to help others succeed.”**

Walter R. Fawcett, III
Founder and CEO

PLEXUS
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Services

Employee Benefits | Business Solutions | Retirement Services | Technology Services

Risk Solutions

One point of contact, dedicated client teams and subject matter experts engage with each client.

Services

01

Employee Benefits Solutions

Healthcare costs are a burden on all companies, but it is important to balance great benefits for your employees and your bottom line. We partner with you to offer innovative, comprehensive benefits that attract and retain employees. Our tailored approach improves your existing program with deep data insights, transformative ideas, and continuous access to our experienced and responsive team.



02



Business Solutions

It is time to choose a broker that approaches things differently. We take the discussion beyond property and casualty insurance to focus on customized risk solutions, identifying and mitigating risks before they cost time and money. Our professionals possess the knowledge and expertise to help tailor a risk management plan suited to your specific exposures.

We operate in all industries and can place coverage in all 50 states, North America, and in 130 countries worldwide. A few of our specialties are outlined below.

03



Plexus Financial Services, LLC

The Plexus Groupe specializes in corporate retirement plan advisory services, including 401(k), profit-sharing plans, 403(b), 457(b), and non-qualified plans, along with other financial care solutions. Our dedicated advisors help your employees pursue financial goals and invest for a successful retirement while mitigating your fiduciary exposure.

Plexus Financial Services, LLC is a wholly-owned subsidiary of The Plexus Groupe.

04



Plexus Technology Services

Over the past two decades, our technology practice has provided extensive support to our clients through various technology services. We are very experienced with Paylocity implementations/operations and can assist you with the following functions. We have also been successful at negotiating insurance carrier “technology credits” to help you offset the setup/file feed costs of the Paylocity platform.

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Thank you!

As an independent organization, The Plexus Groupe LLC strives to provide our clients with unbiased information and opinions to help them evaluate their employee benefit plans and determine what is in their best interest. In this spirit, we welcome your questions and feedback and look forward to assisting you in any way we can.

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