CLIENTS RECEIVE

With our focus being serving social service businesses, we've tailored these resources to you. We believe in education and holistic risk management advice, moving beyond just insurance policies.



SAMPLE MANUALS	POLICY TEMPLATES	CHECKLISTS/SCORECARDS	WHITE PAPERS
Employee Safety	15 Passenger Van	Safety Program	Managing Volunteers
Health Care Employee	Abuse Presentation	Business Ops Checklist	Corporate Recordkeeping
Volunteer Safety	Fleet Safety	Continuity Planning	Risk of violence helping others
Residential Facility Safety	Mobile Device Policy	Employment Practices Risk Scorecard	Personal cars for business use
Business Continuity	Drug-Free Workplace	Creating/Maintaining Employee Files Checklist	Best practices for employee evaluation
	Workplace Violence Prevention	Cyber Risk Scorecard	Incidental medical malpractice for social services
	Safe Driver	Directors & Offices Liability Scorecard	Selecting fiduciaries
	Post-Accident Policy	Event Planning Checklist	Employment practices and donated funds



CONNECT. INSURE. SUCCEED.

Which is better for you?

SCENARIO 1: Shop agencies and insurance companies

AGENT 1:

Presents Quote From Company 1.

AGENT 2:

No Quote to Present.

AGENT 3:

Presents Quote From Company 4.

Insurance Company 1: Gives quote to Agent 1, because they were in first, but doesn't give best rate.

Insurance Company 2: Declines to quote because they received conflicting information from agents.

Insurance Company 3: Underwriting is busy and because they can tell account is shopping, they don't provide quote in time.

Insurance Company 4: Gives quote to Agent 3, but with limited terms and coverages.

SCENARIO 2: Let 1 agency work for you

CHOOSE INSocial Risk Advisors

We spend more time up front to understand you, your risk appetite and your unique needs.

(Collecting data to get quotes from companies isn't the focal point.)

Goes to best fitting companies, compares and negotiates coverage and rate to present the best option(s) to you.

Insurance Company

1

Insurance Company

2

Insurance Company

2



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