



01

Introductions





Kristen Boyd
Executive Director



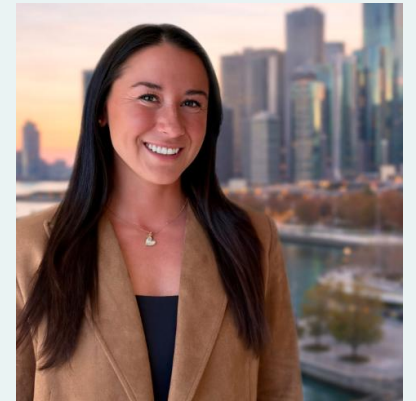
Jill Palmer
Director of Operations & Strategic Partnerships



Heidi Hill
Director of Training, Development & Engagement



Samantha Shaljian
Training Manager



Lindsay Nelson
Engagement Manager

Stronger Together

C2's mission is to accelerate innovative client solutions through the collective strength and shared expertise of entrepreneurial C2 firms.





Be Bold and Lead
Win Together
Drive Solutions
Have Fun and
Build Community

C2 Member Firms – A National Footprint

Ownership

Comprised of seven
of the nation's top
regional firms

Together

Deliver a combination
of unmatched
services

Location

Over 90 strategically
located offices equal
one of the largest
privately held firms
in the nation

C2 Member Firms – A National Footprint



Our Member Firms



Conner Strong & Buckelew

- Founded in 1959
- 600 employees
- Offices in NJ, NY, PA, DE, GA, MA, FL
- 99% Client Retention Rate
- Indexed Pricing Solution: PERMA FAIR
- Employee Benefits, Property & Casualty
- Fiercely Independent

The logo for Conner Strong & Buckelew is a blue square with a white border. Inside the square, the company name is written in white, all-caps, serif font. The text is arranged in three lines: "CONNER" on the top line, "STRONG &" on the middle line, and "BUCKELEW" on the bottom line.

CONNER
STRONG &
BUCKELEW



Cross Insurance

- Founded in 1954
- NE Headquarters (Maine)
- 40 Locations
- 1,100+ Employees
- Employee Benefits, Property & Casualty
- Fiercely Independent

Holmes Murphy



- Founded in 1932
- 16 locations in 11 States
- Headquartered in Des Moines, Iowa, Strong Benefits practice in Dallas & Minneapolis
- Over 1,300 employees
- Employee Benefits, Property & Casualty
- Represent 8 PLUS (subsidiary) companies
- Fiercely Independent



M3 Insurance

- Offices in WI, IL, MI, MN
- 9 Locations
- 500+ Employees
- 95% Client Retention Rate
- Employee Benefits, Property & Casualty
- Fiercely Independent

Scott Insurance

- Located in mid-Atlantic with headquarters in Lynchburg, VA
- 100% Employee Owned
- 9 Offices
- 450+ Employees
- 95% Client Retention
- Employee Benefits, Property & Casualty
- Fiercely Independent

The logo for Scott Insurance features the word "SCOTT" in a bold, white, serif font. The letters are set against a dark red, rounded rectangular background. The background of the entire slide is a light cream color with a vertical gold bar on the right side.

SCOTT

Sterling Seacrest Pritchard



**Sterling
Seacrest
Pritchard**

- Founded in 1960
- Headquartered in the Southeast
- 6 Locations
- 375 Employees
- Employee Benefits, Property & Casualty, Private Risk
- Fiercely Independent



The Partners Group

- Headquartered in the Pacific Northwest
- 5 Locations
- 300+ Employees
- Employee Benefits, Property & Casualty
- Fiercely Independent

C2 by the numbers

4,735 Employees

280 EB Consultants

\$27B Premium Managed

97 Locations

\$371m EB Revenue

36 States

Sales

C2 provides access to BenefitFlow allowing for marketing and prospecting. C2 provides access to BrokerPro a full suite of solutions including Total Rewards and GenPro.

Book Management

C2 provides access to Bnchmrk, ability to benchmark plans against one another and greater marketplace. C2 provides access to Absence Foundations including absence management education, benchmarking, compliance updates, and subject matter expert support.

Vendor Management

C2 provides access to Shortlister to identify opportunities with vendors and be able to model savings to clients.

Book Pricing

C2 provides access to Claros for plan management, budget and risk analysis.

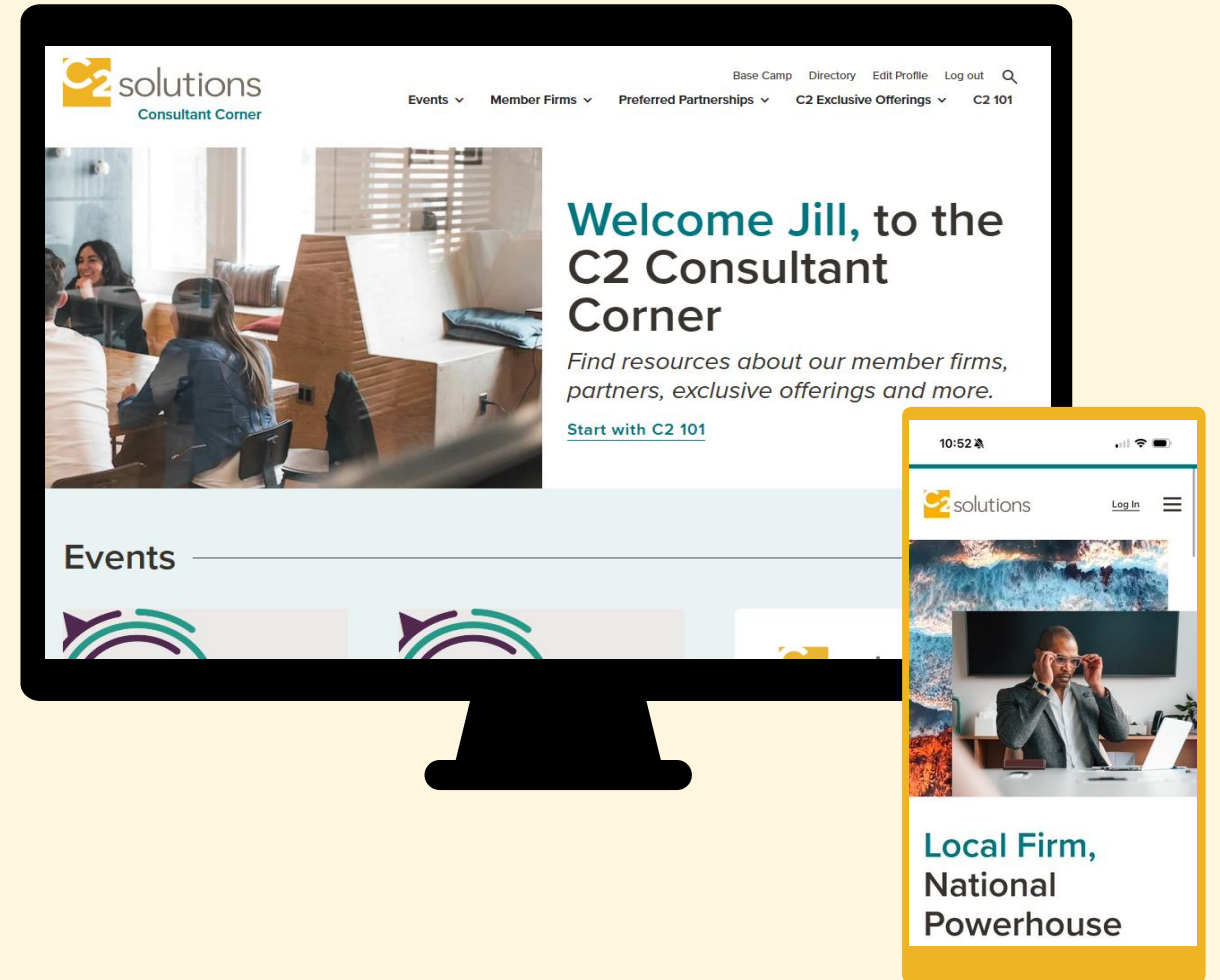
Internal Peer Groups

- HR & Recruiting
- Population Health
- Sales Leads
- Women in Sales
- Operations
- Small Business
- Engagement Specialists
- Carrier Relations
- Underwriting
- Compliance
- Training Advisory
- Service Leaders
- Pharmacy
- Stop Loss
- Marketing
- Communications
- CFOs



C2 Consultant Corner

Online resource member firms can access anytime. Provides up to date resources and information on preferred partners and provides on-demand and virtual trainings.



In Person

- Elevate
- Producer Summit
- Women in Sales
- EB101
- EB201
- EB202

Virtual

- Ancillary, Pharmacy, Captive, Stop Loss
- Base Camp
- ACA, Cafeteria Plans, Captive, COBRA, Dental, Disability, ERISA, FMLA, Foundational Pharmacy, Fully-Insured, Health Plans and Terminology, Health Spending Accounts, HIPAA, Level-Funded, Life and AD&D, Medicare, Reference Based Pricing, Self-Funded, Vision, Voluntary Benefits







Stop Loss

Five strategic partners that cover over \$150 million dollars of self-funded premium.



Ancillary & Worksite

Six strategic partners that cover over \$400 million dollars of ancillary and worksite premium.



Pharmacy

Proprietary repricing platform that includes carve in contracts, leveraged contracts as well as disruptive PBM contracts.



ICHRA

Three strategic partners targeting different industry needs.

Preferred Stop Loss Partners



Preferred Ancillary & Worksite Partners



PBMs



Preferred ICHRA Partners



What does it mean to be a preferred partner?

- National Relationships with Preferred Partners
- Monthly Check-Ins
- Annual Goal Session
- Annual Carrier Survey
- Results shared to assist local conversations
- See how you compare to other C2 preferred partners
- Sponsored Trainings
- Strategic sessions with BOD
- Engagement Scorecard
- Two-way feedback
- Enhanced local relationships





Thank You!