



Insurance Producer of Record Services for Its
Property & Casualty Insurance Program

SOQ No. 24-010

Due: May 7, 2024 at 3:30 pm

Table of Contents

Cover Letter

- I. Overview of McGriff
- II. Why McGriff
- III. Qualifications and Experience
 - A. Scope of Services
 - B. Performance Standards
 - C. Timeline & Use of Resources
- IV. Technology Resources
- V. Attachments
 - A. Insurance Producer's Insurance Requirements
 - 1. Certificates
 - B. Jefferson Parish's Current Insurance Coverages
 - C. Renewal Timetable
 - D. Insurance Initial Qualifying Questionnaire
 - E. List of Prior or Current Public Entity Accounts
 - F. List of Accounts with Total Cost of Risk in Excess of \$5,000,000
 - G. Fee Schedule
- VI. General Professional Services Questionnaire





May 7, 2024

The Parish of Jefferson
Shanna Folsie, Purchasing Specialist II
General Government Building
200 Derbigny Street, Suite 4400
Gretna, LA 70053

Re: Request for Statements of Qualifications To Provide
Insurance Producer of Record Services for Its Property & Casualty Insurance Program

McGriff Insurance Services, LLC is pleased to submit this response to your Request for Statement of Qualifications for Insurance Producer of Record Services for its Property & Casualty Insurance Program. In reviewing our proposal, you will find McGriff to be a national leader in the public entity insurance consulting and brokerage field. As you will see from our references, we understand and excel at servicing the specific needs of public entities.

Two team leaders are assigned to The Parish of Jefferson. I am the main contact and authorized as an agent of McGriff to sign the proposal and negotiate terms and conditions. Our local office is in Metairie and has extensive experience with large governmental entities. We opened the Metairie office in 2005 and the premium volume for the office is in excess of \$35,000,000. You will also have direct access to our regional marketing office in Dallas. The Dallas office opened in 1998 and specializes in nationwide Public Entity Accounts. This office houses the National Public Entity Practice Group and is the governmental entity resource for all McGriff and Truist offices. The premium volume for Texas is in excess of \$850,000,000.

Local Office:

Team Leader – Hank Wolf
McGriff Insurance Services, LLC
3850 N. Causeway Blvd., Suite 1970
Metairie, LA 70002
Phone: 504-831-7208 Fax: 504-831-7201
Cell: 504-450-3602
Email: hwolf@mcgriff.com

National Marketing Office:

Team Leader – Johnny Fontenot
McGriff Insurance Services, LLC
5080 Spectrum Drive, Suite 900E
Addison, TX 75001
Phone: 469-232-2160 Fax: 469-232-2101
Cell: 214-244-1631
Email: jfon@mcgriff.com

Thank you for this opportunity and for considering McGriff Insurance Services, LLC to help manage the exciting challenges that lie ahead. The McGriff team can be available upon notification.

Sincerely,

A handwritten signature in black ink that reads 'Hank Wolf'.

Hank Wolf
Team Leader



Louisiana Department of Insurance

Run: 05/01/2024 10:25 AM

Timothy J. Temple
Commissioner

VERIFICATION OF LICENSE STATUS

License Number: 307452

Name: Henry William Wolf III

NPN: 7843994

Mailing Address: Mcgriff, Seibels & Williams Of Louisiana,
Inc.

3850 N Causeway Blvd Ste 1970

Metairie, LA 700028103

Business Phone: (504) 831-7208

Trade Name(s):

Residency: Resident

Lines of Authority

Producer			
Authority	Effective Date	Valid Through	Status
Accident and Health or Sickness	02/26/2004	07/31/2024	Active
Casualty	09/03/2003	07/31/2024	Active
Life	02/26/2004	07/31/2024	Active
Property	09/03/2003	07/31/2024	Active

Company Appointments

Name	NAIC #	Lines	Issue Date	Status	Inactive Date
CHARTER OAK FIRE INSURANCE COMPANY, THE	25615	Property and Casualty	02/29/2024	Active	12/31/2024
FARMINGTON CASUALTY COMPANY	41483	Property and Casualty	02/29/2024	Active	12/31/2024
HARTFORD LIFE AND ACCIDENT INSURANCE COMPANY	70815	Life Health and Accident	01/01/2024	Active	12/31/2024
National Union Fire Insurance Company of Pittsburgh, PA	19445	Property and Casualty	01/01/2024	Active	12/31/2024
PHOENIX INSURANCE COMPANY, THE	25623	Property and Casualty	02/29/2024	Active	12/31/2024
ST. PAUL FIRE AND MARINE INSURANCE COMPANY	24767	Property and Casualty	02/29/2024	Active	12/31/2024
ST. PAUL GUARDIAN INSURANCE COMPANY	24775	Property and Casualty	02/29/2024	Active	12/31/2024
ST. PAUL MERCURY INSURANCE COMPANY	24791	Property and Casualty	02/29/2024	Active	12/31/2024
STANDARD FIRE INSURANCE COMPANY, THE	19070	Property and Casualty	02/29/2024	Active	12/31/2024
Travelers Casualty Insurance Company of America	19046	Property and Casualty	02/29/2024	Active	12/31/2024
TRAVELERS INDEMNITY COMPANY OF AMERICA, THE	25666	Property and Casualty	02/29/2024	Active	12/31/2024
TRAVELERS INDEMNITY COMPANY OF CONNECTICUT, THE	25682	Property and Casualty	02/29/2024	Active	12/31/2024
TRAVELERS INDEMNITY COMPANY, THE	25658	Property and Casualty	02/29/2024	Active	12/31/2024

Travelers Property Casualty Company of America	25674	Property and Casualty	02/29/2024	Active	12/31/2024
--	-------	-----------------------	------------	--------	------------

Affiliations

Name	Position	Effective Date
Marsh Usa LLC	Vice President	04/26/2006
McGriff Insurance Services, LLC		12/21/2020

NOT AN OFFICIAL LICENSE



Louisiana Department of Insurance
Timothy J. Temple
Commissioner

Run: 05/01/2024 10:26 AM

VERIFICATION OF LICENSE STATUS

License Number: 525051
Name: Johnny Lee Fontenot
NPN: 1239128
Mailing Address: 5080 Spectrum Dr Ste 900E
Addison, TX 750016407
Business Phone: (469) 232-2100
Trade Name(s):
Residency: Nonresident

Lines of Authority

Producer			
Authority	Effective Date	Valid Through	Status
Accident and Health or Sickness	11/04/2010	10/31/2025	Active
Casualty	11/04/2010	10/31/2025	Active
Life	11/04/2010	10/31/2025	Active
Property	11/04/2010	10/31/2025	Active

Company Appointments

Name	NAIC #	Lines	Issue Date	Status	Inactive Date
AMERICAN GUARANTEE AND LIABILITY INSURANCE COMPANY	26247	Property and Casualty	01/01/2024	Active	12/31/2024
AMERICAN ZURICH INSURANCE COMPANY	40142	Property and Casualty	01/01/2024	Active	12/31/2024
ZURICH AMERICAN INSURANCE COMPANY	16535	Property and Casualty	01/01/2024	Active	12/31/2024
ZURICH AMERICAN INSURANCE COMPANY OF ILLINOIS	27855	Property and Casualty	01/01/2024	Active	12/31/2024

Affiliations

Name	Position	Effective Date
McGriff Insurance Services, LLC		12/21/2020

I. Overview of McGriff



Founded in 1886, McGriff, Seibels & Williams and McGriff Insurance Services, collectively “McGriff”, are wholly owned subsidiaries of Branch Banking & Trust (BB&T). BB&T has completed a “Merger of Equals” with SunTrust, to form an entity called Truist Financial.

McGriff is the sixth largest insurance broker in the U.S and the seventh largest in the world in the world, with more than \$2.4 billion in revenue in 2021.

McGriff Insurance Services, LLC is currently part of Truist Insurance Holdings, Inc. We will transition from a Truist owned company to ownership by private equity firms, Stone Point Capital and Clayton, Dubilier & Rice.

MIS/Truist will be well positioned in the insurance industry to remain focused on growth and enhance our focus on premier client service.

McGriff’s solid reputation, and commitment to excellence, helps to attract some of the best and most experienced employees in the industry. The McGriff team has the knowledge, resources and expertise to solve any number of brokerage, risk management or employee benefits challenges.

McGriff’s dedication to clients truly sets us apart and contributes our 93% client retention rate. McGriff provides highly focused brokerage advice and personalized service to our clients. McGriff is a progressive full service insurance brokerage and consulting firm that has been partnering with a variety of corporations over the last 100 years. With the backing of Truist, McGriff has the platform and resources to expand its operations nationally and globally.

Since the merger, McGriff has opened several new offices and have integrated the bulk of Truist’s expertise and resources throughout operations, which have resulted in expanded product offerings and customer service capabilities. We are excited about our future and the continued new opportunities it will bring to our valued clients.

McGriff has grown over 300% in the last ten years. We credit this growth to our exceptional staff, with our outstanding reputation for technical solutions, our exceptional management team, and our client-focused organizational structure. McGriff’s exceptional growth regularly ranks it amongst the highest performing insurance sales organizations in the country.

McGriff operates with minimal bureaucracy which allows each group to respond immediately to customer requests. We understand that our viability as a company depends on our ability to meet your needs.

McGriff Overview continued

With more than a century of experience, McGriff provides highly customized insurance, risk management, and employee benefit solutions for organizations of all sizes. McGriff Insurance Services, Inc. is a subsidiary of Truist Insurance Holdings, Inc., the sixth largest independent insurance broker in the U.S. and seventh largest in the world.

Our experienced risk management professionals develop highly tailored services and deliver them based on a proprietary and proactive approach we call Client Focused Risk Solutions.

We see ourselves as strategic, consultative partners to our clients, providing them with the kind of best-in-class global services they expect from their most trusted advisors. To meet these expectations, McGriff has assembled a team of the very best and brightest professionals in the insurance industry and charged them with being creative problem solvers with a focus on responding to the specific needs of our clientele.

McGriff is well positioned within the insurance industry to help match our clients' needs around the world with the best options available to them in the global marketplace. Our trading partners understand and embrace our client-centric philosophy. Combining their willingness to provide exceptional products and services with our risk management analytics and consulting allows McGriff to deliver the highest quality of customer service, year after year.

When you choose McGriff, you will be joining thousands of other business owners across the country who made the decision to select a national agency that focuses on long-term relationships.

The world is ever changing as is the risk environment facing individuals and businesses alike. McGriff is committed to providing our clients with the advice and guidance necessary to help them successfully navigate their risk path.

About Us

McGriff provides highly consultative insurance and risk management solutions including business property & casualty, bonding & surety, cyber, executive risk, professional liability, workers' compensation, personal lines, and employee benefits.

\$1.1 Billion

2020 Revenue

\$11 Billion

2020 Premium Volume

120+

Office Locations in the U.S.

3,800

Teammates

160

Countries represented
through global partnerships



II. Why McGriff

McGriff has extensive experience with risk management requirements for public entities, including cities, counties, parishes, airports, transportation and port authorities, educational institutions (including colleges and universities), housing authorities and special districts.

Our Public Sector specialists have the experience to help with every aspect of the Parish of Jefferson's risk management program, from designing basic risk transfer strategies to protect buildings and physical assets to developing layered liability coverages to protect the Parish against liability risks. More importantly, McGriff's Public Entity Sector specialists know our clients have higher priorities than simply insuring physical assets and financial accounts.

Our Public Entity Sector practice puts as much emphasis on preventing losses as we do protecting your institution against financial loss due to an accident or lawsuit. By pooling our knowledge of public entity risks into a practice with a singular focus, our Public Entity Sector team's experience set is exponentially greater, allowing us to develop innovative risk solutions for counties of every size.

McGriff serves more than 2,000 public entity/education clients across the country, including 120+ cities and counties.

McGriff is very familiar with the Parish of Jefferson's core functions

McGriff has a broad national and global reach. As a separate operating subsidiary of Truist, we have maintained our strategic direction, customer focus, and exceptional management team. However, with the backing of one of the nation's largest financial holding companies, McGriff has the platform and the resources to continue to grow and expand its reach and operations nationally and globally. We are proud to say that McGriff currently insures over 100 Fortune 1000 clients and provides the large account capability and expertise for all Truist Insurance operations.

Public Entity Sector Risk Management Specialists

Areas of expertise where our public entity/education specialists can help you identify, quantify and manage risk:

- Property
- Casualty
- Directors & Officers Liability
- Professional Liability
- Employment Practices Liability
- Transportation Risk
- Workers' Compensation
- Fiduciary Liability
- Cyber Risk
- Environmental Risk
- International Risk
- Construction & Surety
- Employee Benefits
- Governmental Pools
- Inland Marine
- Ocean Marine
- Aviation
- Healthcare Professional
- Alternative Risk Financing
- TULIP
- OCIP
- CCIP
- SIR & Retention Programs

Why McGriff

We recognize that every client has different and distinct challenges and needs. That is why McGriff focuses on specific industry sectors, which leads to innovation and a heightened level of service that cannot be provided by a generalist. This approach strengthens our capabilities and makes us better business partners for our clients.

The Public Sector arena is a key focus area, and we have made a dedicated effort to hire the best and brightest insurance and risk management professionals available to support the business objectives of this group. The Parish of Jefferson will have the benefit of the background and knowledge of our most senior professionals. McGriff will serve as your ongoing liaison with the insurance marketplace and vendor community for coverage and services. We are certain that given the chance, we can redefine your expectations in the field of insurance broker and risk management consulting services.

Our objectives are to help you obtain the optimal insurance risk transfer product at the lowest cost available in the marketplace. Furthermore, we will support your management team with responsive service and advice on a day-to-day basis. Toward that end, we would like to highlight the following points that differentiate us from the competition:

- **Global Resources of 6th largest broker in the U.S. and of 7th largest broker in the world delivered from the servicing office.**
- **Insurance Broker and/or Consultant for Significant Public Entity Client Base** – McGriff has extensive experience with risk management requirements for public entities.
- **Marketing Leverage** - With combined premium volumes of approximately \$27 Billion, McGriff has considerable leverage in the insurance marketplace.
- **Strong Public Entity Practice Group** – McGriff focuses on distinct business sectors in order to bring the benefit of specialization to our clients, and to insure that there is no learning curve at your expense. This is especially true of the Public Entity Group.
- **Strength of Balance Sheet** – As a member of the Truist family of companies, we are both financially strong and stable. McGriff's annual revenues are in excess of \$1.9 Billion, while our parent company, Truist Corporation, has over \$110 Billion in assets.
- **Independent Broker** – McGriff selects its Third-Party Administrator (TPA), wholesale and international partners based on our confidence that they are truly the best fit for our clients. Our ability to independently select our partners is a key reason for our success and a clear differentiator amongst our peers. We have no corporate mandates or directives regarding the placement of business.
- **Service Team** – Part of McGriff's corporate philosophy is hands-on involvement by senior management personnel in account servicing. Management staff takes part in underwriter negotiations, claims servicing, marketing submissions and more.
- **Association Memberships** – URMIA (University Risk Management & Insurance Association, Inc.); PRIMA (Public Risk Management Association); AGRIP (Association of Government Risk Pools); SALGBA (State and Local Government Benefits Association).

Why McGriff continued

Claims Handling – McGriff employs a full-time claims staff dedicated to facilitating claims for our clients.

In addition, a claims consultant is assigned to each client's account. We believe that the performance of adjusters and claims personnel significantly influences the ultimate cost of a loss. By aggressively supervising the activities of adjusters/claims personnel, the quality of service and loss reserving can be improved.

Our People - Our people are committed to performing at the highest level with the utmost integrity. It's simple – we listen, understand, plan and do what we say we're going to do when we say we're going to do it.

Sense of Urgency - We respond to any request within the day received. Whether we have an immediate answer or not, we will advise you of where we stand and when you will have an answer on the information you are requesting.

Technical Expertise - All members possess the technical skills and knowledge to handle your account. In addition to your local team, expertise or relationships of McGriff associates across the country can easily be accessed.

Creativity - We explore all alternatives, bring innovative thinking into every renewal and help achieve risk management objectives by not always using "insurance" as the only solution. Our stated goal is to rewrite your account every year, not just renew.

Accountability - Each team member is held accountable for the level of service they provide to your team. We do not hand off your account to another associate or location. Your McGriff team members will work on all aspects of your program.

Our Size - From an organizational standpoint, McGriff is better positioned to serve your organization. We are large enough to have a significant depth of resources and substantial market clout, but still small enough to provide the best personalized service. By being a national provider with a flat organizational structure, we have more flexibility that allows us to empower our employees that allow us to adapt to the dynamic needs of your company. While our parent company does not manage our business, as a fully-owned subsidiary, we are accountable to their regulatory service and compliance standards.

Our Relationships - We have longstanding, trusted relationships with senior members in the insurance industry. These relationships help us negotiate the coverage enhancements and claims resolution successes that our clients have come to know and expect.

Company's Philosophy



At McGriff we combine a consultative approach with a clear understanding of how and when to deploy our vast resources for our public entity clients. We listen, understand and execute with precision. We do what we say every single time. And we are passionate and relentless about helping make our clients successful.

Our staff.

McGriff is committed to hiring, developing and retaining the best and brightest people within our industry. We place an emphasis on hiring individuals that are experienced in the public entity areas. Our goal is to provide our customers with the highest level of professionalism, creative thinking and customer service available.

Our structure.

McGriff's organizational structure supports its client-centered approach to doing business. We are a flat organization that operates with a minimum of bureaucracy – each group is uniquely positioned to respond immediately to customer requests. We invest in people and products to meet our clients' needs, rather than layers of management.

Our leadership.

Our senior management maintains hands-on involvement with account service activities to ensure the highest level of service and responsiveness. Regardless of what leadership level they have obtained, all of our employees are first and foremost in the risk management and insurance business.

Our work product.

Our focus on the customer enables us to provide solutions that are as unique as each of our clients. From comprehensive program design to alternative risk transfer mechanisms, we provide the solution that is the best fit for each client. Throughout the consulting engagement, we never lose sight of who we are working for and continually search for ways to improve and deepen our product and service offerings.

III. A. Scope of Services

1. Developing and Maintaining Program

- Identify new coverage needs and exposures to find potential or actual uninsured, over insured or underinsured exposures.
- Structure an insurance program and Request for Proposal to mitigate gaps or overlaps in coverage and provide the limits and coverage requested by the Parish of Jefferson to the extent they are available.
- Provide an annual executive summary of policies and coverage.
- Perform research and provide advice on coverage questions.
- Recommend coverage changes and program adjustments.
- Provide recommendations and advice on alternatives to insurance.
- Advise the Parish on any new developments or changes in the overall insurance market, including new legislation, new coverages introduced and proactively communicate any potential impact to the Parish.
- Perform a risk assessment and coverage review annually.
- Evaluate excess limits and the adequacy of such limits.
- Assess carrier stability, solvency and services record, and provide to the Parish the A.M. Best Rating, including financial stability, of all insurance carriers approached including use of interlocal agreements.
- Conduct client review with internal quality control.

2. Marketing Required Insurance Coverage

- Prepare a market summary of all markets approached and results.
- Place requested coverage on behalf the Parish of Jefferson.
- Act as the liaison and advocate for the Parish with insurers, presenting and/or gathering required data and applications from your staff for the purpose of procuring insurance coverage.
- Collect necessary data and prepare insurance submission packages for the marketing of various coverages for the Parish.
- Select insurers most suitable for the Parish's risks.
- Market the insurance needs of the Parish by soliciting bids (RFPs) from insurance markets and provide the Parish with a summary of the various bids (RFPs) received. (Excel Spreadsheet)
- Negotiate coverage options with insurance carriers to obtain the most beneficial/cost effective program for the Parish.
- Invite the Parish to participate directly in marketing and meetings.
- Keep the Parish informed of negotiations with the underwriters involving placement of all insurance programs.
- Maintain insurer relations.
- Continually evaluate the Parish's insurers with respect to service capability and responsiveness.
- Provide insurance budget estimates.

3. Servicing Policies

- Regular meetings to discuss status, performance, pertinent developments and open items.
- Provide records timely upon request.
- Assist with coverage questions.
- Update schedule of insurance and "limits" as coverage amendments and endorsements take effect.
- Issue certificates of insurance when evidence of liability insurance as required. (in the required time frame)
- Provide insurance requirements and risk management training to the Parish of Jefferson's staff.
- Provide regular reports on losses, expenses, loss ratios and other requested data.
- Arrange for Loss Prevention and Safety Audit services upon request by the Parish.
- Provide claims processing and tracking assistance.
- Provide assistance in developing/evaluating insurance and indemnity clauses in the Parish's contracts.
- Provide insurance review of contracts presented to the Parish.
- Assist the Parish in allocation of premiums as needed.
- Provide accident investigation assistance.
- Periodically evaluate sites.
- Provide performance benchmarking information.
- Provide employee training to augment that of carrier(s).
- Ensure that written claim handling procedures, approved by the insured and insurers, are in place.
- Review coverage issues and negotiate with carriers to achieve satisfactory resolutions.
- Evaluate pre-settlement reviews and attend settlement conferences.

III. A. Scope of Services continued

- Attend Teleconference Meetings as needed
- 60 Day Notification of rate coverage changes or renewal issues
- Perform other services customarily expected of an insurance broker for the duration of the contract to include:
 - Vendor contract and certificate review as requested including contract review.
 - Meeting with carrier claims department and legal department.
 - Review audits and assist in audit dispute resolution.
 - Meet with the Parish's personnel as requested.

Contract and Insurance Requirement Review Program:

McGriff will work with the Parish's Legal and Purchasing staff to review and assist with insurance requirements for contracts. This is a value-added services that McGriff provides. The services include, but are not limited to:

- Regular review and updating of standard insurance requirements specified in RFPs and contracts.
- Regular review and updating of standard insurance requirements specified in Tenant Lease, Concessionaire, and Signatory/Non-Signatory Agreements.
- Review of specific Contractor/Vendor/Tenant proposed insurance coverages, as needed:
 - Provide assistance with clarifications and responses to questions on insurance requirements;
 - Provide assistance with resolving issues and/or non-compliance;
 - Research and provide information on non-standard insurance coverages or terms submitted as alternatives to requirements;
 - Advise/confirm/make recommendations on acceptability of deviations from insurance requirements.
- Review and make recommendations on additional insurance coverages and/or higher limits applicable for specific contracts, as needed.
- Review and make recommendations on indemnification terms and other contract terms/provisions for consistency and coordination with insurance requirements.

III. B. Performance Standards

McGriff agrees these Performance Standard Requirements will be achieved:

Performance Requirements

- 1.1 At a minimum, the selected Producer shall adhere to the Renewal Timetable.
- 1.2 Policies shall be reviewed upon receipt and any required corrections shall be requested in a timely fashion.
- 1.3 Requests for policy changes and/or endorsements shall be processed within one week.
- 1.4 Correspondence and communications from the Parish or its designated representative shall be responded to within one business day from receipt.
- 1.5 Certificates of Insurance will be issued within 24 hours of request.

III. C. Timeline

Project Schedule

McGriff typically prefers to start the renewal process 120 - 150 days prior to renewal. Please see the chart below, with Dates and Teams assigned.

The McGriff Teams track our Services Team

For Flood Coverage Renewals we work on a 60 day window. All applications and payments must be made to the designated Flood Insurance Carrier 30 days prior to the renewal or effective date.

BROKER TRANSITION/RENEWAL & MARKETING TIMELINE

		Responsible Party	
	Sample Timeline	McGriff (MSW)	The Parish
Broker Transition			
- Assign McGriff Broker of Record letter	Award Contract		X
- Identify/Introduce team members and communication channels	10 – 15 Days		
- Client furnish list of all carriers and coverage’s	30 Days		X
- McGriff expedite BOR to all carriers requesting information such as contracts, experience, past renewals etc.	Upon Receipt from the Parish	X Team 2	
- McGriff receive information (typical 10 day waiting period)	10 Days	X	
Pre Renewal Strategic Review	Renewal Date		
- Gather Historical Data	120 – 150 Days Out	Teams 1,2,3	X
- Thorough review of current programs	120 – 150 Days Out	Teams 2,3	
- Prepare benchmarking analysis to assess current plans comparatively	120 Days Out	Teams 1,2,3	
- Review claims experience to understand cost drivers and opportunities for immediate and long term savings	120 Days Out	Teams 2,3,5	
- Discuss Department’s objective / financial – budget objectives	105 Days Out	Teams 1,3	X
- Discuss potential desired plan design changes	105 Days Out	Teams 1,3	X
- Determine marketing requirements - Renewal Objectives	105 Days Out	Teams 1,2,3	X
Renewal / Marketing Process			
- Develop Coverage Specifications	105 Days	Teams 1,2,3	X
- Develop the RFP (Request for Proposal) & Underwriting Submission	105 Days	Teams 2,3,4	X
- Transmit submission to all carriers	95 Days	Teams 2,4	
- Evaluate renewal and market proposals	based on carriers ability to quote 60 days out	Teams 2,3	
- Conduct rate negotiations with finalists	based on carriers ability to quote 60 days out	Teams 2	X
- Develop report & recommendations	30 Days	Teams 2,3	
- Present renewal and marketing results at Client location	Open	Teams 1,3	X
Implementation			
- Inform current and new carriers of renewal decisions	Open	Teams 2,4	
- Give Binding Order	20 Days prior to	Team 2	
- Issue Binders and Certificates of Coverage	15 days prior to Renewal Date upon receipt of carrier binders	Team 4	
Ongoing Service			
- Daily Activities	All Year	MSW	X

MSW Teams:

Team 1 – Account Directors
Team 3 – Account Executives
Team 5 – Claims and Loss Control

Team 2 – Marketing Account Executives
Team 4 – Account Service Representatives



III. C. Use of Resources

Account service is the most important element of the broker evaluation process which the Parish of Jefferson has undertaken. The actual services to be provided by McGriff will be specifically tailored to the requirements which we will jointly identify.

The key to highly successful and effective brokerage team is experience. At McGriff, our goal is to locate, hire and develop the best and brightest people within our industry. Both senior officers and account service staff work to develop partnerships with our clients and maintain in-depth understanding of the unique business environment.

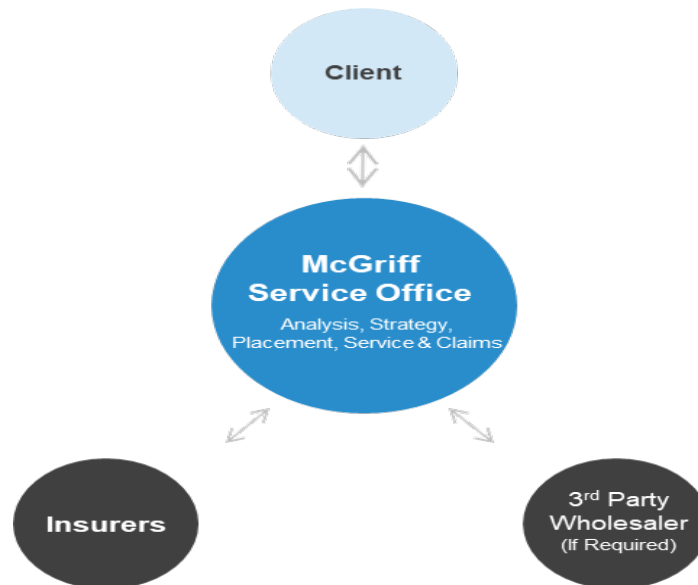
The Public Entity Team has procedures in place to assure that a Senior Account Team Member is always available to offer assistance and resolve any issues that arise.

Please review the chart that shows estimated scheduling. Our key team members are available to meet with the Parish of Jefferson as needed.

Availability of Key Personnel

McGriff Service Model

The entire McGriff organization is built around servicing client needs. Our approach to servicing our clients is not a fragmented approach, but a team approach that personally takes responsibility for all facets of our clients' needs.



Technical Resource Assignments	Areas of Focus
John Palm	Analytics
Doug Keefer	Risk Control
Tom Keel	Risk Control
Travis Nixon / Norm Kessel	Claims
Rachel Becerra / Jackie Day / Addie Liebel	Marketing
Hank Wolf	Team Leader
Johnny Fontenot	Senior Leadership & Coordination
Robert Waggoner / John Palm / Tom Keel	Account Management
Jennifer Falldine / Amy Sierp / Jackie Morris	Day-to-Day Administration
Robert Waggoner	Training & Client Education
Other Assignments – as program objectives are determined	

IV. Technology Resources

Risk Solutions - Client Focused Risk Solutions

As a subsidiary of one of the nation's largest financial institutions, McGriff Insurance Services is uniquely positioned to provide our clients the highest level of innovative risk management services. Our proprietary strategy, client focused risk solutions, is blend of the traditional brokerage-driven services, enterprise risk management and the total cost of risk concepts.

Our Five Step Process

Our strategic risk management approach follows a five-phase process. Each step of the process is supported by resources within McGriff, specific external relationships and a set of proprietary tools. The process includes:

- Identification
- Analysis
- Strategy
- Implementation
- Monitoring & modifying

Identification

Our strategy focuses on four quadrants of risk: Operational, strategic, financial and hazard.

While the traditional brokerage model focuses primarily on hazard risks, our experience indicates only 30 percent of the total cost of risk resides in this quadrant.

Accordingly, we've developed a risk assessment protocol that combined with a series of interviews with your senior management, will allow us to identify and quantify those risks pertinent to your operations.



Our proprietary strategy is a blend of the traditional brokerage-driven service, enterprise risk management and the total cost of risk concepts.

IV. Technology Resources continued

Analytics

McGriff augments experience and knowledge with data and analytics by providing:

Casualty Analytics

- Loss Stratification & Analysis
- Loss Projection
- Collateral Analysis and Negotiation
- Total Cost of Risk (TCOR) Analysis
- Experience Modifier Rating Verification and Promulgation
- Benchmarking of Limits and Deductibles

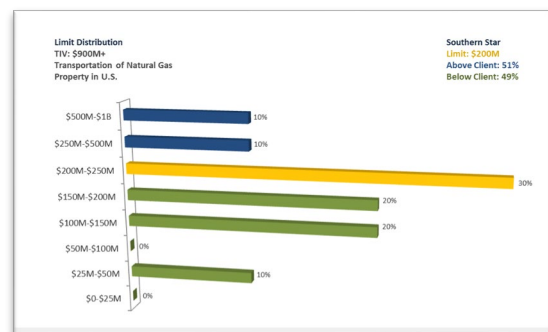
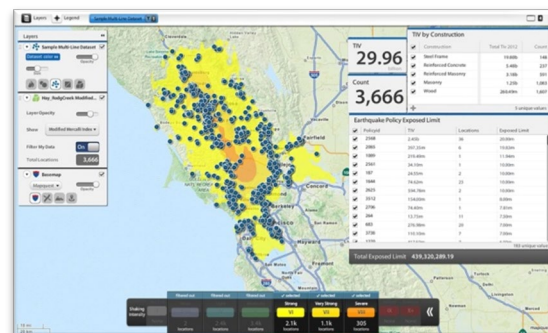
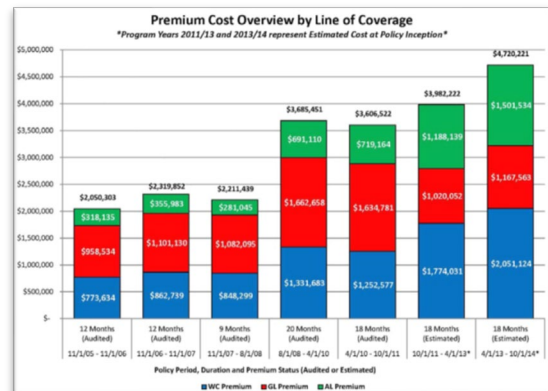
Property Analytics

- Catastrophe (CAT) Modeling
- Historical Catastrophe Event Analysis
- Natural Hazard Mapping and Reporting
- Building Valuation Services

Benchmarking

McGriff's ability to benchmark the Parish's and exposures is supported by our industry focused, but operationally diverse, client base. Your unique set of risks will be evaluated in the context of each operation performed by the Parish.

In addition to our ability to benchmark qualitative aspects of the Parish's risk and exposures, our client base will also support meaningful quantitative benchmarking. To provide this broader perspective we use a combination of in-house peer data and third-party benchmarking resources to compare limits, retentions, cost of risk and other data points.



ATTACHMENT A

INSURANCE PRODUCER'S INSURANCE REQUIREMENTS

GENERAL: The selected Producer(s) shall, at its own cost and expense, procure and maintain the insurance as described herein. Said insurance shall remain in full force and effect for the life of the contracted services with the Parish. With respect to professional liability insurance, this insurance shall remain in effect for at least two (2) years after the termination of the contracted services with the Parish. If requested by the Parish, the Producer shall furnish to the Parish a certificate of insurance evidencing the professional liability insurance for a period of two (2) years after the termination of the agreement. The following insurance coverage shall be provided and maintained and shall apply on a primary basis. The total limits of insurance must be equal to or greater than \$1,000,000 per line of insurance, except the professional liability insurance which must be in an amount at least equal to \$5,000,000; however, this is subject to change. Each major line of insurance may have its own set of requirements that must be met. Where indicated as "If Applicable", coverage will only be required if it is necessary for the Producer to perform services for Jefferson Parish which would indicate the need for that coverage. Except for professional liability insurance, claims made insurance policies ARE NOT acceptable. Evidence of insurance coverage will be provided utilizing the ACORD Certificate of Insurance and must be provided prior to the execution of any contract. In addition to the Certificate of Insurance, Jefferson Parish retains the right to request copies of the selected Producer(s)' entire insurance program (policies) in order to further verify coverage.

WORKERS' COMPENSATION:

- State Act
- Federal Acts
 - USL&H, if applicable
 - JONES ACT, if applicable
 - TWM&C, if applicable
- Employers Liability
- Waiver of Subrogation to include both oral and written contracts in favor of Jefferson Parish, its elected and appointed officials, agents, servants, directors, employees and volunteers
- Alternate Employer Endorsement in favor of Jefferson Parish, its elected and appointed officials, agents, servants, directors, employees and volunteers
- Sixty (60) days prior written Notice of Cancellation, non renewal or adverse material change

GENERAL LIABILITY:

- Commercial General Liability Form CG 00 01 (10 93) or pre-approved equivalent
- Additional Insured Endorsement in favor of Jefferson Parish, its elected and appointed officials, agents, servants, directors, employees and volunteers Form (CG 2026 11/85)

- Waiver of Transfer of Rights of Recovery Against Others To Us to cover both oral and written contracts CG 24 04 (93) in favor of Jefferson Parish, its elected and appointed officials, agents, servants, directors, employees and volunteers
- Sixty (60) days prior written Notice of Cancellation, non-renewal or adverse material change

Note: The General Liability Coverage shall not limit Contractual Coverage for this contract in any way that would prohibit or limit the reporting of any claim and the subsequent defense and indemnity that would normally be provided by the policy.

AUTOMOBILE LIABILITY:

- Coverage to be provided for any auto **or** All owned autos **and** Non-owned and hired autos
- Additional insured and Waiver of Subrogation endorsements in favor of Jefferson Parish, its elected and appointed officials, agents, servants, directors, employees and volunteers
- Sixty (60) days prior written Notice of Cancellation, non renewal or adverse material change

PROFESSIONAL LIABILITY:

- Coverage for the Producer's liability for its operations as an insurance producer and/or broker.
- The policy shall contain no exclusionary language as respects the scope of operations to be performed for Jefferson Parish.
- If this policy contains a deductible or retention, it is understood that the Producer is solely responsible for the payment of any deductible and the Parish of Jefferson has no obligation whatsoever to participate in the payment of said deductible, any co-payments, and/or any claims expenses.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

4/13/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER McGriff Insurance Services LLC 3322 West End Avenue, Suite 300 Nashville TN 37203	CONTACT NAME: Karen Wray PHONE (A/C, No, Ext): 501-661-4973 FAX (A/C, No): E-MAIL ADDRESS: CertificateRequests@truist.com
INSURED Truist Financial Corp. & Subsidiaries 301 College Street, Suite 208 Asheville NC 28801	INSURER(S) AFFORDING COVERAGE INSURER A: Twin City Fire Insurance Company INSURER B: Hartford Fire Insurance Company INSURER C: National Union Fire Ins Co of Pitt. PA INSURER D: Ohio Casualty Insurance Company INSURER E: Hartford Accident & Indemnity Ins Co INSURER F:

COVERAGES**CERTIFICATE NUMBER:** 1515649881**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> SIR 1,000,000 GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC <input type="checkbox"/> OTHER:	Y	Y	20ECSS70004	5/1/2023	5/1/2024	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	Y	Y	20CSES70003	5/1/2023	5/1/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
C D	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$	Y	Y	34543583 ECO(24)60239798	5/1/2023 5/1/2023	5/1/2024 5/1/2024	EACH OCCURRENCE \$ 15,000,000 AGGREGATE \$ 15,000,000 Excess Limit \$ 10,000,000
E A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	Y N/A	20WNS70000 20WBSR70001	5/1/2023 5/1/2023	5/1/2024 5/1/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

20WNS70000 - Workers Compensation (Various Writing Company Names within the Hartford Accident & Indemnity Insurance Company apply based on the state of employment) ~~~ 20WBSR70001 - Workers Compensation for Wisconsin and Massachusetts ONLY

ADDITIONAL INSURED & WAIVER OF SUBROGATION: If your contract or lease requires additional insured wording or waiver of subrogation, the applicable policies above will honor that requirement, as long as the agreement is in place prior to a claim.

CERTIFICATES SHOULD BE OBTAINED BY ACCESSING THE FOLLOWING WEBSITE: www.mcgriff.com/truisteoi**NOTE:** The website is case sensitive, so be sure to use all lowercase letters when typing the web address.

See Attached...

CERTIFICATE HOLDER**CANCELLATION**As Per Your Specific
Contract or Lease
with Truist

...

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

23

© 1988-2015 ACORD CORPORATION. All rights reserved.

**ADDITIONAL REMARKS SCHEDULE**Page 1 of 1

AGENCY McGriff Insurance Services LLC		NAMED INSURED Truist Financial Corp. & Subsidiaries 301 College Street, Suite 208 Asheville NC 28801
POLICY NUMBER		
CARRIER	NAIC CODE	EFFECTIVE DATE:

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: 25 **FORM TITLE:** CERTIFICATE OF LIABILITY INSURANCE

The above coverage is currently in force for Truist Bank including all subsidiaries. Cancellation notice will be executed as per the policy terms and conditions. This certificate will be updated prior to policy renewal date and anytime there is a major material decrease in coverage.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

12/15/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER McGriff Insurance Services, LLC 3400 Overton Park Drive SE Suite 300 Atlanta, GA 30339	CONTACT NAME: PHONE (A/C, No, Ext): 404 497-7500 FAX (A/C, No): E-MAIL ADDRESS:														
INSURED Truist Financial Corporation c/o McGriff Insurance Services, LLC. 301 College Street, Suite 208 Asheville, NC 28801	<table><tr><th>INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr><tr><td>INSURER A :XL Specialty Insurance Company</td><td>37885</td></tr><tr><td>INSURER B :U.S. Specialty Insurance Company</td><td>29599</td></tr><tr><td>INSURER C :ACE American Insurance Company</td><td>22667</td></tr><tr><td>INSURER D :National Union Fire Insurance Company of Pittsburgh, PA</td><td>19445</td></tr><tr><td>INSURER E :</td><td></td></tr><tr><td>INSURER F :</td><td></td></tr></table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A :XL Specialty Insurance Company	37885	INSURER B :U.S. Specialty Insurance Company	29599	INSURER C :ACE American Insurance Company	22667	INSURER D :National Union Fire Insurance Company of Pittsburgh, PA	19445	INSURER E :		INSURER F :	
INSURER(S) AFFORDING COVERAGE	NAIC #														
INSURER A :XL Specialty Insurance Company	37885														
INSURER B :U.S. Specialty Insurance Company	29599														
INSURER C :ACE American Insurance Company	22667														
INSURER D :National Union Fire Insurance Company of Pittsburgh, PA	19445														
INSURER E :															
INSURER F :															

COVERAGES

CERTIFICATE NUMBER:NNEBQ8LE

REVISION NUMBER:

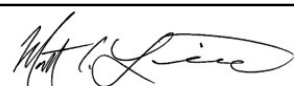
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y <input type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	FI Bond Liability (Includes Cyber & Crime)			ELU194198-23	12/06/2023	12/06/2024	FI Bond \$ 15,000,000
B	Excess FI Bond Liability			14-MGU-23-A57765			\$ 15,000,000 Excess of \$ 15,000,000
C	Excess FI Bond Liability			G46884930 005			\$ 30,000,000 Excess of \$ 15,000,000
D	Excess FI Bond Liability			01-771-68-37			\$ 45,000,000 Excess of \$ 15,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Excess FI Bond Liability (continued) - Effective 12/6/23 - 12/6/24

* Berkshire Hathaway Specialty Insurance Company (NAIC#: 22276) - (Policy #: 47-EPF-309562-05) - Limit - \$15,000,000 in excess of \$60,000,000
* Allied World Assurance Company, Ltd (NAIC#: 19489) - (Policy #: C057900/005) - Limit - \$15,000,000 in excess of \$75,000,000
* National Casualty Company (NAIC#: 11991) - (Policy #: XJO2308807) - Limit - \$15,000,000 in excess of \$90,000,000
* Continental Casualty Company (NAIC#: 20443) - (Policy #: 652171111) - Limit - \$10,000,000 in excess of \$105,000,000
* Markel American Insurance Company (NAIC#: 28932) - (Policy #: MKLM7PL0002506) - Limit - \$10,000,000 in excess of \$115,000,000
* QBE Insurance Corporation (NAIC#: 39217) - (Policy #: 130001850) - Limit - \$10,000,000 in excess of \$125,000,000
(continued next page)

CERTIFICATE HOLDER

For Information Only	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE  25
----------------------	--



ADDITIONAL REMARKS SCHEDULE

Page 2 of 5

PRODUCER McGriff Insurance Services, LLC		INSURED Trust Financial Corporation c/o McGriff Insurance Services, LLC.	
POLICY NUMBER			
CARRIER	NAIC CODE	ISSUE DATE: 12/15/2023	

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: _____ **FORM TITLE:** _____

(continued from previous page)

* Texas Insurance Company, (NAIC#: 16543) (Quota Share) - (Policy #: BFLCYETNC01130002190601) - Limit - \$5,000,000 part of \$10,000,000 in excess of \$135,000,000

* New York Marine and General Insurance Company (NAIC#: 16608) (Quota Share) - (Policy #: EX202300004333) - \$5,000,000 part of \$10,000,000 in excess of \$135,000,000

* National Casualty Company (NAIC#: 11991) (Quota Share) - (Policy #: XJO2308806) - Limit - \$10,000,000 part of \$105,000,000 in excess of \$145,000,000

* Vantage Risk Assurance Company (NAIC#: 32077) (Quota Share) - (Policy #: P04FL000015592) - Limit - \$5,000,000 part of \$100,000,000 in excess of \$145,000,000

* Fidelity Deposit Company of Maryland (NAIC#: 39306) (Quota Share) - (Policy #: FID 1885478-04) - Limit - \$10,000,000 part of \$105,000,000 in excess of \$145,000,000

* Endurance Risk Solutions Assurance Co. (NAIC#: 43630) (Quota Share) - (Policy #: FIX30001371804) - Limit - \$10,000,000 part of \$105,000,000 in excess of \$145,000,000

* National Union Fire Insurance Company (NAIC#: 19445) (Quota Share) - (Policy #: 01-771-68-35) - Limit - \$5,000,000 part of \$100,000,000 in excess of \$145,000,000

* Westfield Specialty Insurance Company (NAIC#: 16992) (Quota Share) - (Policy #: XCE-00001MC-02) - Limit - \$10,000,000 part of \$105,000,000 in excess of \$145,000,000

* Liberty Mutual Insurance Company (NAIC#: 23035) (Quota Share) - (Policy #: FINYABWO3N005) - Limit - \$10,000,000 part of \$105,000,000 in excess of \$145,000,000

* Allianz Global Risks US Insurance Company (NAIC#: 35300) (Quota Share Lead) - (Policy #: USF00604723) - Limit - \$10,000,000 part of \$105,000,000 in excess of \$145,000,000

* General Security National Insurance Company (NAIC#: 19822) (Quota Share) - (Policy #: FA0095879-2023-1) - Limit - \$5,000,000 part of \$105,000,000 in excess of \$145,000,000

* Twin City Fire Insurance Company (NAIC#: 29459) (Quota Share) - (Policy #: 20 MB 0298207-23) - Limit - \$5,000,000 part of \$105,000,000 in excess of \$145,000,000

* Atlantic Specialty Insurance Company (NAIC#: 27154) (Quota Share) - FIN-000483-0003) - Limit - \$5,000,000 part of \$105,000,000 in excess of \$145,000,000

* Ascot Insurance Company (NAIC#: 23752) (Quota Share) - (FIXS2310000100-04) - Limit - \$10,000,000 part of \$105,000,000 in excess of \$145,000,000

* Midvale Indemnity Company (NAIC#: 27138) (Quota Share) - (Policy #: BFX-145722024-02) - Limit - \$10,000,000 part of \$105,000,000 in excess of \$145,000,000

Excess Cyber Liability (Only) - Effective 12/6/23 - 12/6/24

* Berkshire Hathaway Specialty Insurance Company (QS) - (NAIC#22276) - (Policy #: 47-EPF-309563-05) - Limit - \$5,000,000 part of \$50,000,000 in excess of \$250,000,000

* Freedom Specialty Insurance Company (QSLead) - (NAIC#: 22209) - (Policy#:XMF2310722) - Limit - \$10,000,000 part of \$50,000,000 in excess of \$250,000,000

* QBE Specialty Insurance Company (QS) - (NAIC#: 11515) - (Policy #: 130006119) - Limit - \$5,000,000 part of \$50,000,000 in excess of \$250,000,000

* SCOR & Liberty (QS) - (Policy#: B0180FN2311420) - Limit - \$15,000,000 part of \$50,000,000 in excess of \$250,000,000

* Starr Surplus Lines Insurance Company (QS) - (NAIC#: 13604) - (Policy#: 1001236530231) - Limit - \$5,000,000 part of \$50,000,000 in excess of \$250,000,000

* Vantage Risk Specialty Insurance Company (QS) (NAIC#: 16275) - (Policy#: P03CY0000047740) - Limit - \$10,000,000 part of \$50,000,000 in excess of \$250,000,000

* Arch Specialty Insurance Company (QSLead) (NAIC#: 21199) - (Policy#: NPL0064769-04) - Limit - \$10,000,000 part of \$100,000,000 in excess of \$300,000,000

* Amtrust - Associated Industries Insurance Company, Inc (QS) - (NAIC#: 23140) - (Policy#: AES1212766 02) - Limit - \$20,000,000 part of \$100,000,000 in excess of \$300,000,000

* Validus - Western World Insurance Company (QS) (NAIC#: 13196) - (Policy#: CVX8000513) - Limit - \$10,000,000 part of \$100,000,000 in excess of \$300,000,000

* XL Bermuda Limited (QS) - (Policy#: BM00039846EO23A) - Limit - \$10,000,000 part of \$100,000,000 in excess of \$300,000,000

* Aspen American Insurance Company (QS) (NAIC#: 43460) - (Policy#: AY00FCW23) Limit - \$10,000,000 part of \$100,000,000 in excess of \$300,000,000

* Atri - Fair American Select Insurance Company (QS) - (NAIC#: 15201) - (Policy#: MPX-1040023-00) Limit - \$5,000,000 part of \$100,000,000 in excess of \$300,000,000

* Intact - Atlantic Specialty Insurance Company (QS) - (NAIC#: 27154) - (Policy#: FIN-000509-0004) Limit - \$5,000,000 part of \$100,000,000 in excess of \$300,000,000

* Starr Surplus Lines Insurance Company (QS) - (NAIC#: 13604) - (Policy#:1000634257231) Limit - \$10,000,000 part of \$100,000,000 in excess of \$300,000,000

26



ADDITIONAL REMARKS SCHEDULE

Page 3 of 5

PRODUCER McGriff Insurance Services, LLC		INSURED Trust Financial Corporation c/o McGriff Insurance Services, LLC.	
POLICY NUMBER		ISSUE DATE: 12/15/2023	
CARRIER	NAIC CODE		

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: _____ **FORM TITLE:** _____

(continued from previous page)

* National Union Fire Insurance Company of Pittsburgh, PA (QS) - (NAIC#: 19445) - (Policy#: 01-824-08-01) Limit - \$5,000,000 part of \$100,000,000 in excess of \$300,000,000
 * Ascot Specialty Insurance Company (QS) - (NAIC#: 45055) - (Policy#: EOXS231000031704) Limit - \$5,000,000 part of \$100,000,000 in excess of \$300,000,000
 * Safety Specialty Insurance Company (QS) - (NAIC#: 13815) - (Policy#: CY 6676663) Limit - \$10,000,000 part of \$100,000,000 in excess of \$300,000,000
 * Trium - Lloyds (QS) - (Policy#: TRCX237HDP) Limit - \$10,000,000 part of \$30,000,000 in excess of \$400,000,000
 * Crum & Forster Specialty Insurance Company. (QS) - (NAIC#:) - (Policy#: CYB-106816) Limit - \$5,000,000 part of \$30,000,000 in excess of \$400,000,000
 * Aspen American Insurance Company (QS) - (NAIC#: 13815) - (Policy#:B0180FN2315953) Limit - \$5,000,000 part of \$30,000,000 in excess of \$400,000,000
 * HDI Global Insurance Company (QS) - (NAIC#: 41343) - (Policy#: FRL-H-X-ET-00002370-01) Limit - \$10,000,000 part of \$30,000,000 in excess of \$400,000,000
 * Berkley Assurance Company (QS) - (NAIC#: 39462) - (Policy#:BCRS2-2000091-04) Limit - \$5,000,000 part of \$10,000,000 in excess of \$430,000,000
 * Continental Casualty Company (QS) - (NAIC#: 20443) - (Policy#:768756758) Limit - \$5,000,000 part of \$10,000,000 in excess of \$430,000,000
 * The Princeton Excess and Surplus Lines Insurance Company (QS) - (NAIC#: 10786) - (Policy#:9E-A3-CY-0000001-04) Limit - \$5,000,000 in excess of \$440,000,000
 * XL Specialty Insurance Company (QS) - (NAIC#: 37885) - (Policy#:ELU194407-23) Limit - \$5,000,000 in excess of \$445,000,000

FI Bond Deductible is \$25,000,000. FI Bond includes Cyber Liability.

FOR INFORMATION ONLY



ADDITIONAL REMARKS SCHEDULE

PRODUCER McGriff Insurance Services, LLC		INSURED Trust Financial Corporation c/o McGriff Insurance Services, LLC.	
POLICY NUMBER		ISSUE DATE: 12/15/2023	
CARRIER	NAIC CODE		

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: _____ FORM TITLE: _____

Bankers Professional Liability and Employment Practices Liability - Effective 12/6/23- 12/6/24

*XL Specialty Insurance Co. (NAIC#: 37885) - (Policy #: ELU194142-23) - Limit- \$15,000,000
 *U.S. Specialty Insurance Co. (NAIC#: 29599) - (Policy #: 14-MGU-23-A57751) - Limit- \$15,000,000 in excess of \$15,000,000
 *ACE American Insurance Co. (NAIC#: 22667) - (Policy #: DOX G46884899 005) - Limit- \$15,000,000 in excess of \$30,000,000
 *Berkshire Hathaway Specialty Insurance Co. (NAIC#: 22276) - (Policy #: 47-EPF-309560-05) - Limit- \$15,000,000 in excess of \$45,000,000
 *National Union Fire Insurance Company of Pittsburgh, Pa. (NAIC#: 19445) - (Policy #: 01-760-18-74) - Limit- \$15,000,000 in excess of \$60,000,000
 *Markel American Insurance Co. (NAIC#: 28932) - (Policy #: MKLM6EL0010427) - Limit- \$15,000,000 in excess of \$75,000,000
 *Freedom Specialty Insurance Co. (Quota Share) (NAIC#: 22209) - (Policy #: XMF2309373) - Limit- \$10,000,000 part of \$15,000,000 in excess of \$90,000,000
 *Arch Insurance Co. (Quota Share) (NAIC#: 11150) - (Policy #: BLX1000038-03) - Limit- \$5,000,000 part of \$15,000,000 in excess of \$90,000,000
 *Continental Casualty Company (NAIC#: 20443) - (Policy #: 652171089) - Limit- \$15,000,000 in excess of \$105,000,000
 *Allianz Global Risks US Insurance Company (NAIC#: 35300) - (Policy #: USF00604623) - Limit- \$10,000,000 in excess of \$120,000,000
 *Starr Indemnity & Liability Company (NAIC#: 38318) - (Policy #: 1000622167231) - Limit- \$10,000,000 in excess of \$130,000,000
 *Berkley Insurance Company (Quota Share Lead) (NAIC#: 32803) - (Policy #: BPRO8102328) - Limit- \$10,000,000 part of \$60,000,000 in excess of \$140,000,000
 *Argonaut Insurance Company (Quota Share) (NAIC#: 19801) - (Policy #: MLX4244505-4) - Limit- \$10,000,000 part of \$60,000,000 in excess of \$140,000,000
 *Endurance Risk Solutions Assurance Co. (Quota Share) (NAIC#: 43630) - (Policy #: FIX30001372504) - Limit- \$10,000,000 part of \$60,000,000 in excess of \$140,000,000
 *Axis Insurance Company (Quota Share) (NAIC#: 39273) - (Policy #: P-001-000227396-04) - Limit- \$10,000,000 part of \$60,000,000 in excess of \$140,000,000
 *RSUI Indemnity Company (Quota Share) (NAIC#: 22314) - (Policy #: NHS708012) - Limit- \$10,000,000 part of \$60,000,000 in excess of \$140,000,000
 *Samsung Fire & Marine Insurance Company, Ltd. (Quota Share) (NAIC#: 38300) - (Policy #: SGC 0331-04) - Limit- \$5,000,000 part of \$60,000,000 in excess of \$140,000,000
 *Freedom Specialty Insurance Co. (Quota Share) (NAIC#: 22209) - (Policy #: XMF2309372) - Limit- \$5,000,000 part of \$60,000,000 in excess of \$140,000,000

Bankers' Professional Deductible is \$50,000,000
 Insurance Agents' E&O Deductible is \$50,000,000.
 Bankers' Professional Liability includes Insurance Agents' E&O.



ADDITIONAL REMARKS SCHEDULE

Page 5 of 5

PRODUCER McGriff Insurance Services, LLC		INSURED Truist Financial Corporation c/o McGriff Insurance Services, LLC.	
POLICY NUMBER		ISSUE DATE: 12/15/2023	
CARRIER	NAIC CODE		

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: _____ **FORM TITLE:** _____

All subsidiaries of Truist Financial Corporation, including their subsidiaries, and their respective individually branded business divisions and successors in interest, are covered entities under the above policies. Sterling Capital Management, LLC is a subsidiary of Truist Financial Corporation.

Insurance Operations:

Truist Insurance Holdings, LLC

McGriff Insurance Services, LLC, including its subsidiaries, is a wholly owned subsidiary of Truist Insurance Holdings, LLC.

Kensington Vanguard National Land Services, LLC and (ii) GRS Title Services, LLC (any of which may operate under the D/B/As of BridgeTrust Title Group and/or Kensington Vanguard National Title and/or Commercial Title Group and/or Community Settlement) are wholly owned subsidiaries of McGriff Insurance Services, LLC. A complete list of title agencies including addresses attached, if required.

Crump Life Insurance Services, LLC, including its subsidiaries, is a wholly owned subsidiary of Truist Insurance Holdings, LLC. Crump Life Insurance Services, LLC, Tellus Brokerage Connections, LLC and PJ Robb Variable, LLC as covered entities.

CRC Insurance Services, LLC including its subsidiaries, is a wholly owned subsidiary of Truist Insurance Holdings, LLC - Hanleigh Management, LLC; J.H. Blades & Co., LLC; Starwind Specialty Insurance Services, LLC (DBA Norman-Spencer Agency, LLC); Venture Underwriters, LLC; Vincere, LLC; Aspen Managing General Agency, LLC; National Claims Services, LLC; Centerstone Insurance and Financial Services, LLC; Mather & Strohl Administrative Services, LLC; A.G. Insurance Agencies, LLC; DKG Insurance & Financial Services, LLC; ASD Insurance and Financial Services, LLC; Forest Financial Insurance and Financial Services, LLC; Financial Liberty Group, LLC, Balor Insurance Services

AmRisc, LLC is a wholly owned subsidiary of Truist Insurance Holdings, LLC, - All Wellington Insurance entities are subsidiaries of AmRisc, LLC.

ALL EMPLOYEES OF THE ENTITIES LISTED ABOVE ARE COVERED UNDER THE VARIOUS POLICIES LISTED WITHIN THIS CERTIFICATE

ANY DIVISION OR SUBSIDIARY OF THE ENTITIES LISTED ABOVE ARE COVERED UNDER THE VARIOUS POLICIES LISTED WITHIN THIS CERTIFICATE, AS LONG AS THEY ARE AT LEAST 51% OWNED BY ONE OF THOSE LISTED.

FOR INFORMATION ONLY

ATTACHMENT B

JEFFERSON PARISH'S CURRENT INSURANCE COVERAGES

General Notes:

- Program contains Property, Casualty, and Liability coverages.
- NFIP Flood coverage is currently placed through Hartford Insurance Co. Total Estimated Annual Premium is \$483,44.00; see also "Other Items" table below for count of policies.
- Claims Third Party Administrator for self-insured retentions is CCMSI.
- Insurance Program data provided is for illustrative purposes only.
- Summary Schedule of Insurance follows; this Summary is provided as an overview of the scheduled policies and is not meant to provide all details of coverage, terms, conditions and exclusions that apply.
- **In the interest of competitive responses and except for the NFIP program, current insurance program premiums and costs will not be provided as part of this SOQ.**

Other Items	Total
Outgoing Certificates of Insurance--average, issued annually.	70
Commercial Property Location Count	230
Commercial Auto Vehicle Count	908
Excess Workers' Compensation Payroll Exposure	\$146 million
NFIP Count of Policies (NB: 111 policies renew on April 1 st)	121

The following is a summary listing of insurance coverages that Jefferson Parish currently purchases. The successful Producer will be responsible for these lines of coverage on behalf of the Parish in addition to NFIP coverage.

Type ¹	Description	Insurance	Policy Dates	Limits	Deductible
Accidental Injury	1st & 2nd Parish Court Community Service Program	Great American	4-1		
Accidental injury	Dixie/Dizzy Dean Baseball	Great American	4-1		
Accidental Injury	Jeff. Parish Community Emergency Response Team & Medical Reserve Corps.	Great American	4-1		
Accidental injury	Headstart Program - Parish Wide	Great American	4-1		

¹ Insurance Program data provided is for illustrative purposes only. This Summary is provided as an overview of the scheduled policies and is not meant to provide all details of coverage, terms, conditions and exclusions that apply.

Type ¹	Description	Insurance	Policy Dates	Limits	Deductible
Accidental Injury	Friends of the Animal Shelter Volunteers	Great American	4-1		
Accidental Injury	Recreation Sports/Activities - Parish Wide	US Fire	4-1		
Auto Liability	First Parish Court vehicles	Travelers Indemnity Co.	05/01/23-05/01/24	\$1,000,000	
Auto Liability	Second Parish Court vehicles	Travelers Indemnity Co.	05/01/23 - 05/01/24	\$1,000,000	
Auto Liability	Juvenile Court vehicles	Travelers Indemnity Co.	05/01/23 - 05/01/24	\$1,000,000	
Auto Physical Damage	Parish owned vehicles	Lexington Insurance Co.	05/01/23 - 05/01/24	\$7,500,000	
Boiler & Machinery	Boilers & Electrical panels, etc.	Hartford Steam Boiler	10/01/23 - 10/01/24	\$100,000,000	\$100,000
Crime	CDBG crime policy	Zurich	02/16/23 - 02/16/24		
D&O/Fiduciary	Jefferson Parish Hospital Service District No. 1	StarStone Specialty Ins. Co.	10/01/23 - 10/01/24	\$3,000,000 D&O \$3,000,000 Fiduciary	\$0 IA A D&O \$150,000 IA B D&O \$150,000 IA C D&O \$1,000,000 Clam Fiduciary
Employee Crime	Juvenile Court 1546 Gretna Blvd, Harvey 70059	Travelers	10/01/22 - 10/01/25	3 year policy Annual Installment	
Excess AL and GL	Excess coverage on general liab., auto liab., workers' comp. and public officials liab.	American Alternative Ins.	05/01/23 - 05/01/24	\$4,000,000.00	
Excess D&O	Jefferson Parish Hospital Service District No. 2	Homeland Ins.	10/01/23 - 10/01/24	\$5,000,000 Limit	
Excess Fiduciary	Jefferson Parish Hospital Service District No. 1	Republic Vanguard Ins.	10/01/23-10/01/24	\$2,000,000 excess of \$3,000,000	
Fiduciary	Jefferson Parish Employees' Retirement System	Hudson Ins.	10/01/23 - 10/01/24	\$2,000,000 Agg Lmt	
General Liability	Jefferson Parish Employees' Retirement System	Scottsdale Insurance Co.	10/01/23 - 10/01/24	\$2,000,000.00	
General Liability	Office of Inspector General	Western World	09/01/23 - 09/01/24	\$1,000,000 Occ \$2,000,000 Agg.	
GL/Professional Liability	Head Start Birth to 5 Program	Houston Casualty Co.	10/28/23 - 10/28/24	\$1,000,000 Ech Claim \$3,000,000 Agg.	\$10,000 Ech Claim
Inland Marine	Valuable papers and books (Library)	Everest	10/15/23 - 10/15/24	\$10,000,000 Occ	\$25,000 Ded.
Inland Marine - All Perils	Contractors equip., computers, portable radios, valuable papers, art, ltrons, hand held computers	Travelers Property Casualty Company of America	05/01/23 - 05/01/24	\$26,663,985 CE \$2,986,286 Equip F	\$5,000 Ded.

Type ¹	Description	Insurance	Policy Dates	Limits	Deductible
Inland Marine - Fine Arts	Thomas Jefferson Statue and art works	AXA Art Insurance Corp.	05/01/23 - 05/01/24	\$367,154.00 Max. Occ.	\$50,000 Ded.
Inland Marine - Water Line	Waterline from Lafitte to Grand Isle	Homesite Insurance Co Of Florida	02/23/2023 – 02/23/2024	1,000.000 Limit per Trigger Location (5 locations) Parametric	
Mstr Fire EC	Properties > \$250,000	Great American	04/01/23 - 04/01/24	\$100,000,000 Loss Limit	\$500,000 Ded.
Property	Eoc & Segnette Field	Lloyds	05/01/23 - 05/01/24	1.0% of \$5M WH / 1.0% \$41,138,737 AOP	
Property	Eoc & Segnette Field	QBE Speciality Ins	05/01/23 - 05/01/24	8.5% of \$5M WH / 8.5% \$41,138,737 AOP	
Property	Eoc & Segnette Field	Lloyds	05/01/23 - 05/01/24	2.02% of \$5M WH / 2.0% \$41,138,737 AOP	
Property	Eoc & Segnette Field	Steadfast Ins. Co	05/01/23 - 05/01/24	9.5% of \$5M WH / 9.5% \$41,138,737 AOP	
Property	Eoc & Segnette Field	Old Republic Union	05/01/23 - 05/01/24	4.0% of \$5M WH / 4.0% \$41,138,737 AOP	
Property	Eoc & Segnette Field	GeoVera Speciality Ins	05/01/23 - 05/01/24	18.0% of \$5M WH / 18.0% \$41,138,737 AOP	
Property	Eoc & Segnette Field	Transverse Speciality Ins.	05/01/23 - 05/01/24	18.0% of \$5M WH / 18.0% \$41,138,737 AOP	
Property	Eoc & Segnette Field	National Fire & Marine Ins.	05/01/23 - 05/01/24	33.0% of \$5M WH / 33.0% \$41,138,737 AOP	
Property	Eoc & Segnette Field	Spinnaker Speciality Ins	05/01/23 - 05/01/24	5.0% of \$5M WH / 5.0% \$41,138,737 AOP	
Property	Yenni Bldg., 1st Parish Court & 2nd Parish Court, streets bldg	Travelers Ins. Co.	05/1/23 - 05/01/24	Split per Bldg value.	
Public Employee Dishonesty & Crime	Lapalco Bridge (Harvey Canal crossing)	Chubb	05/01/23 - 05/01/24	\$38,510,074 Limit	\$100,000 Ded.
Public Officials & Employees Liability	Employee theft, misappropriation	Travelers Casualty and Surety Co of America	01/01/23 - 01/01/24	3 year policy Annual Installment	
Public Officials & Employees Liability	Office of Inspector General	Westchester Surplus	01/22/24 - 01/22/25	\$1,000,000 Ech Clm \$1,000,000 Agg.	
WC excess	Elected officials, appointed officials and employees	AIG	10/01/23 - 10/01/24	\$1,000,000 Occ. \$1,000,000 Agg.	\$250,000 Ded.
Wind/Hail	Parish employees	Safety National Casualty Corp.	05/01/23 - 05/01/24	\$25M Specific Limit \$1M EL Limit	\$2M SIR

Type ¹	Description	Insurance	Policy Dates	Limits	Deductible
Wind/Hail	Properties > \$250,000	Swiss Re Solutions	04/01/23 - 04/01/24	Excess 5% \$1.25M p/o \$25,000,000	
Wind/Hail	Properties > \$250,000	Hallmark Speciality	04/01/23 - 04/01/24	Excess 10% \$2,500,000 part of \$25,000,000	
Wind/Hail	Properties > \$250,000	Lexington	04/01/23 - 04/01/24	Excess 22% \$5.5M part of \$25,000,000	
Wind/Hail	Properties > \$250,000	Evanston	04/01/23 - 04/01/24	Excess 10% \$2.5M p/o \$25,000,000	
Wind/Hail	Properties > \$250,000	Fidelis Underwriting Limited	04/01/23 - 04/01/24	Excess 20% \$5.0M part of \$25,000,000	
Wind/Hail	Properties > \$250,000	Arch Speciality	04/01/23 - 04/01/24	Excess 10% \$2.5M part of \$25,000,000	
Wind/Hail	Properties > \$250,000	The Princeton Excess	04/01/23 - 04/01/24	Excess 5% \$2,25M part of \$45,000,000	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 - 04/01/24	Excess \$4.15% \$1,867,500 part of \$45M	
Wind/Hail	Properties > \$250,000	Lloyds.	04/01/23 - 04/01/24	Excess 0.25% \$112,500.00 part of \$45M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 - 04/01/24	Excess 1.50% \$675,000.00 part of \$45M	
Wind/Hail	Properties > \$250,000	HDI Global Speciality	04/01/23 - 04/01/24	Excess 0.25% \$112,500.00 part of \$45M	
Wind/Hail	Properties > \$250,000	Covington Speciality Ins.	04/01/23 - 04/01/24	Excess 0.40% \$180,000.00 part of \$45M	
Wind/Hail	Properties > \$250,000	Western World Ins	04/01/23 - 04/01/24	Excess 1.20% \$540,000.00 P/O \$45M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 - 04/01/24	Excess .080% \$360,000.00 P/O \$45M	
Wind/Hail	Properties > \$250,000	Paomar Excess and Surplus	04/01/23 - 04/01/24	Excess 0.70% \$315,000.00 P/O \$45M	
Wind/Hail	Properties > \$250,000	Evanston	04/01/23 - 04/01/24	Excess 0.50% \$225,000.00 P/O \$45M	

Type ¹	Description	Insurance	Policy Dates	Limits	Deductible
Wind/Hail	Properties > \$250,000	Gotham Ins	04/01/23 – 04/01/24	Excess 0.25% \$112,500.00 P/O \$45M	
Wind/Hail	Properties > \$250,000	Fidelis Underwriting	04/01/23 – 04/01/24	Excess 5.50% \$1,00,000.00 P/O \$20M	
Wind/Hail	Properties > \$250,000	<u>Westfield Speciality Ins</u>	04/01/23 – 04/01/24	Excess 10.00% \$2,000,000.00 P/O \$20M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 – 04/01/24	Excess 10.00% \$2,000,000.00 P/O \$20M	
Wind/Hail	Properties > \$250,000	Starstone Speciality Ins	04/01/23 – 04/01/24	Excess 80.00% \$4,000,000.00 P/O \$50M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 – 04/01/24	Excess 12.50% \$3,125,000.00 P/O \$25M	
Wind/Hail	Properties > \$250,000	Houston Casualty	04/01/23 – 04/01/24	Excess 13.00% \$3,250,000.00 P/O \$25M	
Wind/Hail	Properties > \$250,000	Fortegra Speciality	04/01/23 – 04/01/24	Excess 2.00% \$500,000.00 P/O \$25M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 – 04/01/24	Excess 14.00% \$3,500,000.00 P/O \$25M	
Wind/Hail	Properties > \$250,000	Endurance	04/01/23 – 04/01/24	Excess 10.00% \$2,500,000.00 P/O \$25M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 – 04/01/24	Excess 10.50% \$525,000.00 P/O \$5M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 – 04/01/24	Excess 15.00% \$750,000.00 P/O \$5M	
Workers' Compensation	Properties > \$250,000	The Princeton Excess	04/01/23 – 04/01/24	Excess 15.00% \$750,000.00 P/O \$5M	
Workers' Compensation - 1st Parish Ct	Jefferson Parish Employees' Retirement System	Louisiana Workers' Comp. Co.	05/14/23 - 05/14/24	100/500/100	
Workers' Compensation - 2nd Parish Ct	1st Parish Court employees	Louisiana Workers' Comp. Co.	05/14/23- 05/14/24	1M/1M/1M	
Workers' Compensation - Juvenile Ct	2nd Parish Court employees	Louisiana Workers' Comp. Co.	05/14/23 - 05/14/24	1M/1M/1M	
Sexual Abuse	Juvenile Court employees	Louisiana Workers' Comp. Co.	05/14/23 - 05/14/24	1M/1M/1M	
Cyber	JeffCap, Head Start, Birth to Five	Amwins	03/01/23 – 03/01/24	\$3,000,000.00	\$250K

Type ¹	Description	Insurance	Policy Dates	Limits	Deductible
Medical Reserve Corp.	Emergency Management	Columbia Casualty	05/01/23 – 05/01/24	\$3,000,000.00	

ATTACHMENT C


RENEWAL TIMETABLE

The successful Producer(s) will be expected to adhere to the following renewal time table. Please confirm your willingness to comply below.

ACTIVITY	COMPLETION DAYS PRIOR TO RENEWAL
Initial Planning Session	150
Request for Conceptual Qualification Submission to Producer	120
Meeting between Director & Producer	110
Producer compiles data for Quotations	105
Information is released to Companies	95
Quotations received by Producer	60
Quotations submitted to Director	45
Quotations Analyzed	30
Coverage Selected	20
Binders Issued	15
Certificates of Coverage Issued	10
Renewal Date	0

I / We agree to adhere to and comply with the above renewal timetable in servicing the Parish's insurance program.

Name of Firm: McGriff Insurance Services, LLC



Signature

5/2/2024

Date

Producer

Title

ATTACHMENT D

**INSURANCE PRODUCER INITIAL QUALIFYING
QUESTIONNAIRE**

Please note, if applicable, all sub-Producers that will be used on this project must complete this form.

Identifying Information:

Name of Firm: McGriff Insurance Services, LLC

Address: 3850 North Causeway Blvd., Suite 1970

City: Metairie State: Louisiana Zip: 70002

Principal of Firm: Henry W. Wolf III

E-mail Address: hwolf@mcgriff.com

Primary Telephone: (504) 831-7208

Firm's Qualifications:

Date Established: 1886

Total Number of Employees: 3500

Number of Louisiana employees who will be working on this project 3

Location of office from which this account will be serviced: Metairie

Describe the ownership of your Firm. Truist Insurance Holdings

Are you licensed in the State of Louisiana: X YES NO

Louisiana Producer Number: 307452 Expiration Date: 7/31/2024

Name of licensed Principal(s): Henry W. Wolf III

Have you handled an account within the last 10 years with a total cost of risk in excess of \$5,000,000? Yes

Do you have experience in providing producer services similar to those outlined in the

SOQ? Yes

Do your commercial lines accounts generate an annual premium volume of at least \$10,000,000? Yes


For how many Louisiana Public Entity clients within the last 10 years do you currently provide or have you provided Producer of Record Services? 15

What are the locations of any branch offices/affiliates that will assist in servicing this contract? (list location & affiliate name)

McGriff Insurance Services, LLC
5080 Spectrum Drive, Suite 900E
Addison, TX 75001
Public Entity Practices National Office

Please provide a narrative addressing the following:

- A. Please describe what technology will the FIRM utilize while servicing the Parish?
 - a. How will this technology help to market the Parish's insurance program?
 - b. How will this technology assist the Parish's Risk Management Department implement, monitor, and administer its property and casualty insurance program?
 - c. How will this technology make the Parish insurance program more efficient?
 - d. How will this technology help reduce the Parish's expenses related to its insurance program?
- B. Please provide the names and positions of each professional to be assigned to the Parish's account, including their knowledge and experience with other public entities. Describe the professional qualifications and education of each team member. Provide two (2) references for each team member.
- C. Provide an explanation of what distinguishes the services the Firm can provide from other Person or Firms, and any additional or unique services your Firm would provide to the Parish.
- D. Describe the method you will use to secure competitive quotes for the Parish's insurance program, including surplus lines relationships and intended usage.



Signature

5/2/2024

Date

Producer

Title

PLEASE NOTE: Jefferson Parish reserves the right to verify any information provided herein.

A. Technology Related Services

McGriff Client Portal

The McGriff Client Portal allows clients to log into their portal to access timely news, information and safety resources. If applicable, OSHA injuries and illnesses can be logged, tracked and analyzed. The Client Portal will connect you with an online community of over 325,000 risk management colleagues across the US to share information and post and answer questions. The Documents on Command feature of the Client Portal gives you access to branded, shareable and printable compliance, safety, legislation and employee communication resources.

McGriff Webinars

Our monthly webinars are offered at no additional costs to our clients. Relevant, trending and critical risk management topics are examined by knowledgeable industry experts. Recent topics included:

- *"Intersecting the World of Cyber Security & Employment Law"*
- *"Managing Suspected Drug Use with Dignity"*
- *"Are You Hiring Your Next Accident?"*
- *"DOT Updates: Safe Driving Up the Highway"*
- *"Employment Practices Liability: Understand, Respond and Mitigate Like a Pro"*
- *The ABC's of Active Shooter Training*

Advisen Loss Insight

Loss Insight provides data on significant accidents, lawsuits, regulatory actions, and events. A complementary suite of analytical tools enables analysis of trends to support decisions on risk evaluation, pricing, and program structure. There are more than 400,000 global severity events and 13 million US Federal litigation dockets, exceeding \$3 trillion in loss values, in the Loss Insight database. We can filter this database to display loss insights specific to Public Entity and Education clients, and further to show losses by type of coverage. We will share what types of losses are growing in frequency and severity and how new and emerging risks might impact the Parish of Jefferson.

Advisen Benchmarking

Partnering with Advisen gives McGriff access to a global database of insurance policies, filterable by industry, size, line of coverage and other parameters. We will share industry benchmarks with the Parish Jefferson to share trends, cost effectiveness and peer insights.

CertExchange

McGriff has a web-based system for Certificates of Insurance. This system can be utilized by your service team and your approved users to issue certificates based on data entered into the system by your service team. The certificates can only be issued showing specific information preset in the system. The certificates can then be emailed from the system to the Parish and/or the certificate holder.

A. Risk Evaluation Services

Building Replacement Cost Valuation Estimation

To ensure your stated property values are accurate, we can utilize Marshall-Swift Beck Commercial Estimating software and/or engage our large property risk consultants.

Natural Catastrophe Analytics Modeling

McGriff utilizes RMS RiskBrowser and RiskLink (version 13.0) as well as AIR/2 (version 15.0) for modeling. For RMS we access the U.S. Hurricane and U.S. Earthquake models. For AIR we license the U.S. Hurricane, U.S. Severe Thunderstorm (tornado-hail), and U.S. Earthquake models.

The Catastrophe models are very sensitive to data quality and format issues. McGriff will scrub the data for model input to ensure location-level information and policy terms are accurate and provided in a format that the model will execute. Working on the model data prior to marketing the account allows McGriff to prioritize recommendations for the Parish in order to truly validate their exposure. The investments we make in data improvement will maximize the number of underwriters capable of offering quotes on the Parish of Jefferson's renewal, and will have a material impact on the Catastrophe model results that are a primary driver of all the underwriters' renewal pricing and capacity decisions.

The above process will be completed for both RMS and AIR. Once imported, data will be geocoded within each model to return the local characteristics and ensure that each location is geocoded appropriately.

The models will then be run and results will be analyzed and discussed with the Parish of Jefferson. Formatted data are then created and available for distribution to the underwriting marketplace.

A. Technology/Data

Risk Solutions - Client Focused Risk Solutions

As a subsidiary of one of the nation’s largest financial institutions, McGriff Insurance Services is uniquely positioned to provide our clients the highest level of innovative risk management services. Our proprietary strategy, client focused risk solutions, is blend of the traditional brokerage-driven services, enterprise risk management and the total cost of risk concepts.

Our Five Step Process

Our strategic risk management approach follows a five-phase process. Each step of the process is supported by resources within McGriff, specific external relationships and a set of proprietary tools. The process includes:

- Identification
- Analysis
- Strategy
- Implementation
- Monitoring & modifying

Identification

Our strategy focuses on four quadrants of risk: Operational, strategic, financial and hazard.

While the traditional brokerage model focuses primarily on hazard risks, our experience indicates only 30 percent of the total cost of risk resides in this quadrant.

Accordingly, we’ve developed a risk assessment protocol that combined with a series of interviews with your senior management, will allow us to identify and quantify those risks pertinent to your operations.



Our proprietary strategy is a blend of the traditional brokerage-driven service, enterprise risk management and the total cost of risk concepts.

A. Technology/Data continued

Analytics

McGriff augments experience and knowledge with data and analytics by providing:

Casualty Analytics

- Loss Stratification & Analysis
- Loss Projection
- Collateral Analysis and Negotiation
- Total Cost of Risk (TCOR) Analysis
- Experience Modifier Rating Verification and Promulgation
- Benchmarking of Limits and Deductibles

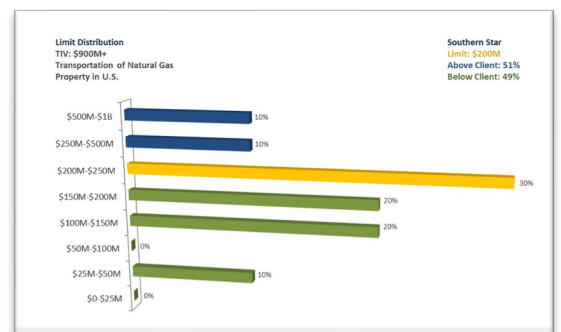
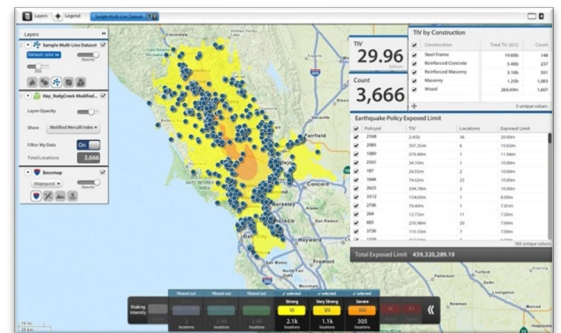
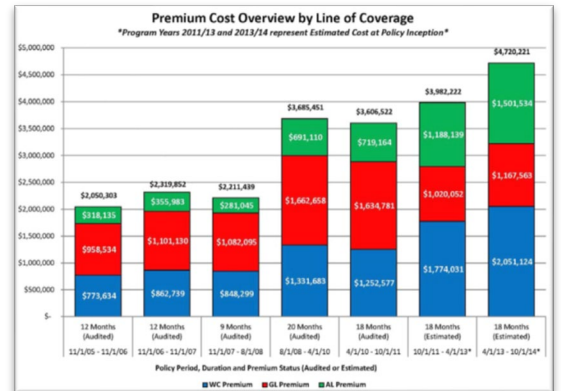
Property Analytics

- Catastrophe (CAT) Modeling
- Historical Catastrophe Event Analysis
- Natural Hazard Mapping and Reporting
- Building Valuation Services

Benchmarking

McGriff's ability to benchmark the Parish's and exposures is supported by our industry focused, but operationally diverse, client base. Your unique set of risks will be evaluated in the context of each operation performed by the Parish.

In addition to our ability to benchmark qualitative aspects of the Parish's risk and exposures, our client base will also support meaningful quantitative benchmarking. To provide this broader perspective we use a combination of in-house peer data and third-party benchmarking resources to compare limits, retentions, cost of risk and other data points.



B. Service Team

Client Satisfaction

Part of McGriff's corporate philosophy is hands-on involvement of senior management personnel in account servicing. Management staff takes part in underwriter negotiations, claims servicing, marketing submissions and more. The Public Entity team has procedures in place to assure that a senior account member is always available to offer assistance and resolve any issues that arise.

With our dedicated account team, various team members are available 24 hours a day, 7 days a week to meet any account service needs. Phone calls and emails are returned promptly and special projects are handled on a timely schedule.

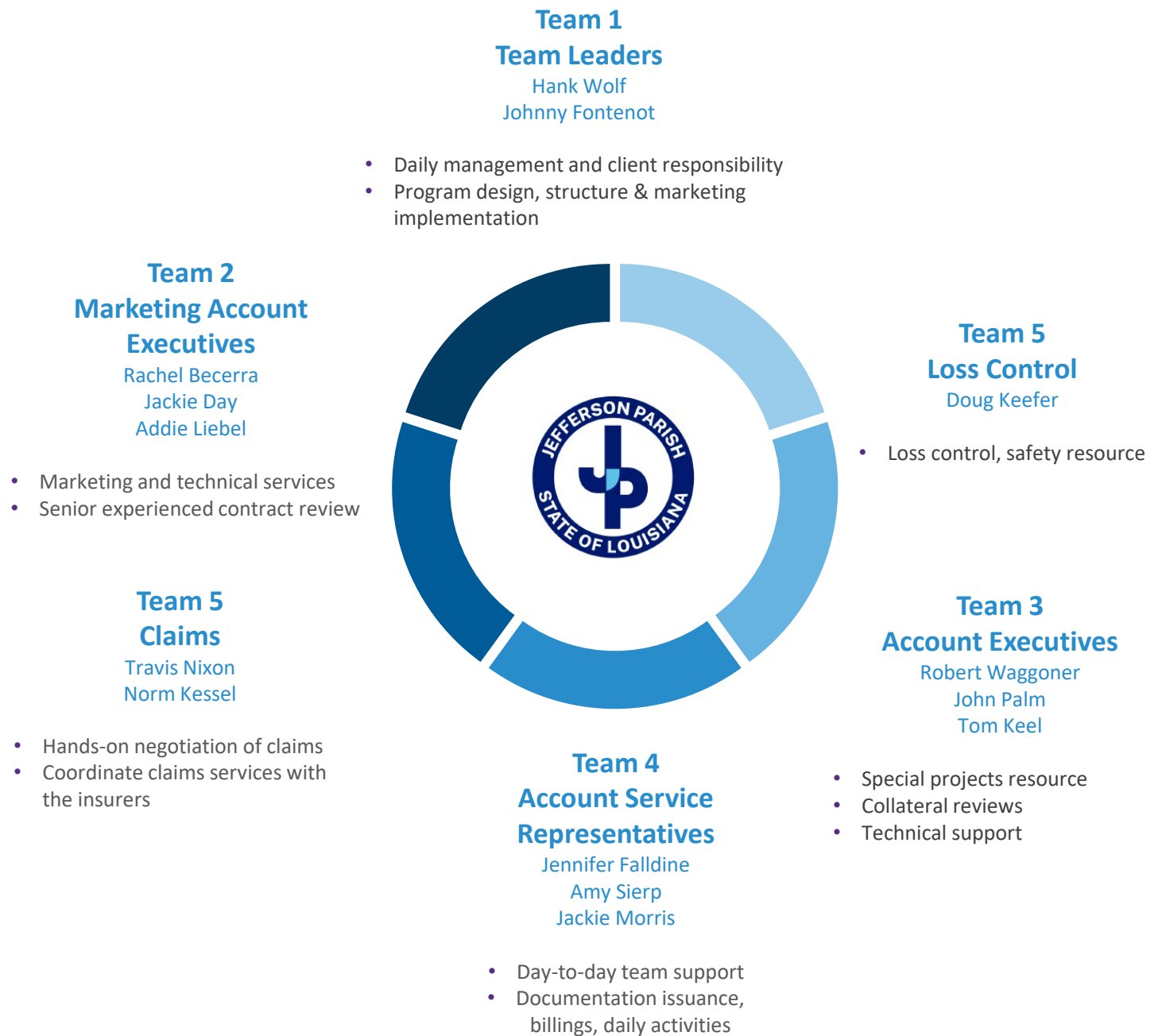
Highly focused brokerage advice and personalized service adds up to top quality risk management programs that get results.

We operate with a minimum of bureaucracy - our group is geared to respond immediately to customer requests. We understand that our viability as a company depends on our ability to meet your needs.

Our boundless dedication to our clients is what truly sets us apart and contributes most to our success. In fact, our client retention rate averages 93%.



B. Service Team



B. Service Team – Contact Information

Contact Person	Position	Daily Contacts	Contact Information Phone/Cell	Email
Hank Wolf - Metairie, LA	Team Leader	X	504-831-7208/ 504-450-3602	Greg.singleton@mcgriff.com
Johnny Fontenot - Dallas, TX	Team Leader		469-232-2160/ 214-244-1631	jfontenot@mcgriff.com
Robert Waggoner - Dallas, TX	Account Executive		469-232-2140/ 214-649-6625	rwaggoner@mcgriff.com
John Palm - Metairie, LA	Account Executive	X	504-832-2681/ 214-878-5687	jpalm@mcgriff.com
Tom Keel - Dallas, TX	Account Executive		469-203-7759	Tom.keel@mcgriff.com
Rachel Becerra - Dallas, TX	Marketing Account Executive	X	469-232-2172/ 469-644-6502	Rachel.Becerra@mcgriff.com
Jackie Day - Dallas, TX	Marketing Account Executive	X	469-232-2162/ 469-766-7525	jday@mcgriff.com
Addie Liebel - Metairie, LA	Marketing Account Executive	X	504-831-7205/ 504-495-8421	aliebel@mcgriff.com
Jennifer Falldine - Dallas, TX	Daily Service		469-232-2142/ 214-566-5273	Jennifer.Falldine@mcgriff.com
Amy Sierp - Dallas, TX	Daily Service	X	469-232-2123	Amy.Sierp@mcgriff.com
Jackie Morris - Dallas, TX	Daily Service		469-232-2109	Jacqueline.morris@mcgriff.com
Travis Nixon - Dallas, TX	Claims		469-232-2194/ 972-655-4645	tnixon@mcgriff.com
Norman Kessel - Dallas, TX	Claims	X	469-232-2146/ 214-235-5619	nkessel@mcgriff.com
Doug Keefer - Dallas, TX	Loss Control	X	469-232-2130/ 214-215-8250	dkeefer@mcgriff.com
Claims	Main Number for Reporting		877-624-7433	

B. Resumes of Team Members

Hank Wolf

Team Leader/Producer

Metairie, Louisiana

Direct: 504-831-7208 Mobile: 504-450-3602

Email: hwolf@mcgriff.com

EDUCATION

Louisiana State University, B.S. Finance

LICENSES/CERTIFICATIONS

Property and Casualty Producer License: LA, TX, MS

Life & Health Producer License: LA, TX, MS

AREAS OF EXPERTISE

Public Entities / Governmental Risk Management

Relationship Management

Program Design, Marketing, Placement & Servicing of

Energy, Marine & Commercial Risks

Claims Management

CLIENT EXPERIENCE

Public Entities

Energy & Marine

Manufacturing

Transportation

Retail

Environmental

Hotel/Restaurant

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

30+ years of experience in Claims and Risk Management

EXPERIENCE HISTORY

McGriff, Seibels & Williams, Inc. now McGriff Insurance Services, Inc.

2008 – Present

Team Leader/Producer

Marsh USA

2003 – 2008

Senior Vice President

Brown & Co.

1983 – 2003

Vice President

REFERENCES:

City of New Orleans

Eldridge Morris, Risk Manager

504-658-8909

eldridge.morris@nola.gov

St. Tammany Parish Government

Andrea L. Kuracka, Risk Manager

985-898-5226

alkuracka@stpgov.org

B. Resumes of Team Members

Johnny Fontenot, CPCU, AIC, ARM

Executive Vice President, Head of Office

Dallas, Texas

Direct: 469-232-2160 Mobile: 214-244-1631

Email: jfon@mcgriff.com

EDUCATION

McNeese State University, B.S. Management and Marketing

LICENSES/CERTIFICATIONS

Chartered Property & Casualty Underwriter

Associate Risk Manager

Associate in Claims

Licensed Risk Manager

AREAS OF EXPERTISE

Public Entities / Governmental Risk Management

Owner Controlled Insurance Programs (OCIPs)

Governmental Risk Pools

Large Commercial Accounts

Claims

CLIENT EXPERIENCE

Public Entities

Manufacturing

Retail

Hotel/Restaurant

Energy & Marine

Transportation

Environmental

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

20+ years of experience in Claims and Risk Management

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.

2010 – Present

Executive Vice President, Head of Office

McGriff, Seibels & Williams, Inc.

1998 – 2010

Senior Vice President, Public Entity Division

Sedgwick, Inc.

1993 – 1998

Vice President, Public Entity Division

City of Garland

1992 – 1993

Risk Manager

City of Beaumont

1986 – 1992

Risk Manager

REFERENCES:

City of Tampa

Valerie Horton-Rakes, Risk Manager

813-274-5737

Valerie.hortonrakes@tampagov.net

City of New Orleans

Eldridge Morris, Risk Manager

504-658-8909

Eldridge.morris@nola.gov

B. Resumes of Team Members

Robert Waggoner, ARM, CGBA

Senior Vice President, Account Executive

Dallas, Texas

Direct: 469-232-2140 Mobile: 214-649-6625

Email: rwaggoner@mcgriff.com

EDUCATION

Texas A & M University, B.S. Psychology/Management

LICENSES/CERTIFICATIONS

Associate Risk Manager

Certified Governmental Benefits Administrator

AREAS OF EXPERTISE

Public Entities / Governmental Risk Management

Workers' Compensation

Property

Loss Control and Safety Programs

General/Auto Liability

CLIENT EXPERIENCE

Public Entities

Manufacturing

Retail

Hotel/Restaurant

Energy & Marine

Transportation

Environmental

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

20+ years of experience in Claims and Risk Management

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.

2003 – Present

Vice President/Senior Vice President

City of Denton

2000 – 2003

Risk Manager

City of Garland

1995 – 2000

Risk Specialist

James Helwig & Son Trucking

1994 – 1995

Safety Director

Stevens Transport

1990 – 1994

Safety & Training Coordinator

REFERENCES:

New Orleans Aviation Board

Michele Allen-Hart, General Counsel

504-303-7601

Mallen-hart@flymsy.com

City of Houston

Tina Paquet, Assistant Director

832-393-8792

tina.paquet@houstontx.gov

B. Resumes of Team Members

John F. Palm III, ARM

Assistant Vice President, Account Executive

Metairie, Louisiana

Direct: 504-832-2681 Mobile: 214-878-5687

Email: jpalm@mcgriff.com

EDUCATION

University of Southern Mississippi, MPH Occupation Health & Safety

University of Southern Mississippi, BS Psychology

LICENSES/CERTIFICATIONS

Associate in Risk Management

AREAS OF EXPERTISE

School Risk Management Programs

Workers' Compensation

Campus Security

Loss Control and Safety Programs

Property/Casualty Programs

Contracts & Agreements

CLIENT EXPERIENCE

Public Entities

Municipalities

Schools

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.

Account Executive

2018 – Present

Allen Independent School District

Director of Risk Management

2013 – 2018

Mesquite Independent School District

Risk Management & Operations Manager

2011 – 2013

Mesquite Independent School District

Safety Officer

2006 – 2011

United Rentals

Risk Control Manager

2004 – 2006

Center for Technology & Environmental Health

Industrial Hygienist/Safety Manager

2001 – 2004

REFERENCES:

New Orleans Aviation Board

Michele Allen-Hart, General Counsel

504-303-7601

Mallen-hart@flymsy.com

St. Tammany Parish

Andrea L. Kuracka, Risk Manager

985-898-5226

alkuracka@stpgov.org

B. Resumes of Team Members

Tom Keel, MPA, ARM, CSHO**Account Executive**

Dallas, Texas

Mobile 469-203-7759

Email: tom.keel@mcgriff.com

EDUCATION

Midwestern State University, B.A.A.S. Public Administration

University of North Texas, Masters in Public Administration

LICENSES/CERTIFICATIONS

Associate Risk Manager (ARM)

Licensed Risk Manager in Texas

General Lines Agent – Property & Casualty

Certified Safety and Health Official (CSHO)

Licensed Adjuster – All Lines

Licensed Firefighter and EMT

AREAS OF EXPERTISE

Public Entities / Governmental Risk Management

Workers' Compensation

Property

Loss Control and Safety Programs

General/Auto Liability

Claims Management

CLIENT EXPERIENCE

Public Entities

Housing Authority

Commercial Construction

Education

Transportation

EXPERIENCE HISTORY

McGriff Insurance Services

Insurance Industry

2020 - Present

27 Years

USCG and US Army Veteran

Prior Risk Manager for the Dallas Housing Authority and interim Risk Manager for the City of Denton

REFERENCES:

City of Tampa

Valerie Horton-Rakes, Risk Manager

813-274-5737

Valerie.hortonrakes@tampagov.net

City of Houston

Tina Paquet, Assistant Director

832-393-8792

tina.paquet@houstontx.gov

B. Resumes of Team Members

Rachel Becerra, ACSR**Assistant Vice President, Marketing Account Executive**

Dallas, Texas

Direct: 469-232-2172 Mobile: 469-644-6502

Email: rachel.becerra@mcgriff.com**EDUCATION**

Trinity Valley Community College

LICENSES/CERTIFICATIONS

Accredited Customer Service Representative (ACSR)

1 part of 5 Certified Risk Manager (CIC)

3 Parts of 4 Certified School Risk Manager (CSRM)

AREAS OF EXPERTISE

Public Entities

Higher Education

CLIENT EXPERIENCE

Public Entities

Manufacturing

Transportation

Hotel/Restaurant

Retail

Environmental

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

20+ years of experience in Customer Service and Account Management

EXPERIENCE HISTORY*McGriff Insurance Services, Inc.**2000 – Present*

Assistant Vice President, Senior Account Manager

*Aon Risk Services, Inc.**1997 – 2000*

Assistant Account Service Representative

*Liberty Mutual Insurance Company**1995 – 1997*

Claims Call Director

REFERENCES:

New Orleans Aviation Board

Michele Allen-Hart, General Counsel

504-303-7601

Mallen-hart@flymsy.com

St. Tammany Parish Government

Andrea L. Kuracka, Risk Manager

985-898-5226

alkuracka@stpgov.org

B. Resumes of Team Members

Jackie Day, CPCU, CIC, AAI

Senior Vice President/Marketing AE

Dallas, Texas

Direct: 469-232-2162 Mobile: 469-766-7525

Email: jday@mcgriff.com

EDUCATION

Mesa College, Colorado

LICENSES/CERTIFICATIONS

Chartered Property & Casualty Underwriter

Certified Insurance Counselor

Accredited Adviser in Insurance

AREAS OF EXPERTISE

Public Entities / Governmental Risk Management

Property

Design, marketing and servicing of major commercial accounts

CLIENT EXPERIENCE

Public Entities

Hotel/Restaurant

Manufacturing

Retail

Transportation

Environmental

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

25+ years of experience Insurance Marketing

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.

1998 – Present

Senior Vice President/Marketing Account Executive

Sedgwick, Inc.

1994 – 1998

Account Executive, Public Entity Division

Dexter & Company

1987 – 1994

Commercial Lines Manager

REFERENCES:

New Orleans Aviation Board

City of Houston

Michele Allen-Hart, General Counsel

Tina Paquet, Assistant Director

504-303-7601

832-393-8792

Mallen-hart@flymsy.com

tina.paquet@houstontx.gov

B. Resumes of Team Members

Addie Liebel

Senior Vice President/Marketing Account Executive Direct: 504-831-7205 Mobile: 504-495-8421
Metairie, Louisiana Email: aliebel@mcgriff.com

EDUCATION

Associate of Business Administration, Delgado Community College

LICENSES/CERTIFICATIONS

Property and Casualty Producer License, LA
Surplus Lines Brokers License, LA

AREAS OF EXPERTISE

Production, program design, marketing, placement and servicing of Marine & Energy Risks
Marine Hull, Protection & Indemnity, Cargo, Builders Risk, Maritime Employers Liability, Marine General Liability, Ship Repairers Legal Liability, Vessel Pollution Liability
Experience negotiating risk placements
Contract evaluation relative to insurance requirements

CLIENT EXPERIENCE

Marine Public Entity
Maritime

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

30+ years of experience Insurance Marketing and Account Service

EXPERIENCE HISTORY

McGriff Insurance Services, Inc. Senior Vice President/Marketing Account Executive	2005 – Present
Marsh USA Account Executive	2003 – 2005
Gulf Coast Marine, Inc. Underwriter/Broker	1998 – 2003
Sedgwick James of New Orleans, Inc. Account Executive/Producer	1997 – 1998
Trident Marine Managers, Inc. Broker/Service Administrator	1991 – 1997
Mid-Gulf Agency, Inc. Service Representative	1986 – 1991

REFERENCES:

Plaquemines Port Harbor & Terminal District
Christie Nielsen, Director of Administration/HR
504-682-7920
cnielsen@pphtd.com

Broussard Brothers, Inc.
Torie Theriot, General Counsel
337-892-4149
toriet@broussardbrothers.com

B. Resumes of Team Members

Jennifer Falldine, ACSR, CAM

Account Manager

Dallas, Texas

Direct: 469-232-2142 Mobile: 214-566-5273

Email: Jennifer.falldine@mcgriff.com

EDUCATION

Hillsborough Community College – Business Administration

Oklahoma State University – Business/Accounting Major

LICENSES/CERTIFICATIONS

General Lines Texas Insurance Agent

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

17 Year in the Insurance Industry

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.

Account Manager

April 2022 – Present

Sleeper Sewell

Account Manager

2021 – 2022

BevCap Management

Account Manager

2019 – 2022

CoVerica

Account Manager

2012 – 2019

Roach Howard Smith & Barton

Senior Account Manager

2005 – 2012

REFERENCES:

New Orleans Aviation Board

Michele Allen-Hart, General Counsel

504-303-7601

Mallen-hart@flymsy.com

City of Houston

Tina Paquet, Assistant Director

832-393-8792

tina.paquet@houstontx.gov

B. Resumes of Team Members

Amy Sierp**Senior Client Service Specialist**

Addison, Texas

Direct: 469-232-2123

Email: Amy.Sierp@mcgriff.com**EDUCATION**

Plano East Senior High

LICENSES/CERTIFICATIONS

Property and Casualty Agent License: Texas

AREAS OF EXPERTISE

Property
General Liability
Automobile Liability
Workers' Compensation
Public Entities

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

2 Years Experience in Commercial Insurance Account Management

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.- Dallas
Senior Client Service Specialist

2023 - Present

Sleeper Sewell- Dallas
Account Manager

*2021***REFERENCES:**

City of Houston
Tina Paquet, Assistant Director
832-393-8792
tina.paquet@houstontx.gov

St. Tammany Parish Government
Andrea L. Kuracka, Risk Manager
985-898-5226
alkuracka@stpgov.org

B. Resumes of Team Members

Jacqueline Morris**Senior Client Service Specialist**

Addison, Texas

Direct: 469-232-2109

Email: Jacqueline.Morris@mcgriff.com

EDUCATION

Crockett High School – Austin, TX

LICENSES/CERTIFICATIONS

Property and Casualty Agent License: Texas

AREAS OF EXPERTISE

Property

General Liability

Automobile Liability

Workers' Compensation

Public Entities

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

10 Years Experience in Commercial Insurance Account Management

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.- Dallas
Senior Client Service Specialist

2023 - Present

RISKPRO Insurance Agency, LLC
Account Manager

2015-2023

REFERENCES:

New Orleans Aviation Board
Michele Allen-Hart, General Counsel
504-303-7601
Mallen-hart@flymsy.com

Plano Independent School District
Darla Bishop, Risk Manager
469-752-4792
darla.bishop@pisd.edu

B. Resumes of Team Members

Travis Nixon

Vice President, Claims and Risk Services

Dallas, Texas

Direct: 469-232-2194 Mobile: 972-655-4645

Email: tnixon@mcgriff.com

EDUCATION

University of Texas

LICENSES/CERTIFICATIONS

Property and Casualty Agent

Adjuster – All Lines

AREAS OF EXPERTISE

Public Entities / Governmental Risk Management

Design, marketing and servicing of major commercial accounts

Loss Control and Safety Programs

CLIENT EXPERIENCE

Public Entities

Manufacturing

Transportation

Hotel/Restaurant

Retail

Environmental

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

20+ years of experience in Claims and Risk Management

EXPERIENCE HISTORY

McGriff, Seibels & Williams, Inc. now McGriff Insurance Services, Inc.

Vice President, Claims and Risk Services

2017 – Present

McGriff, Seibels & Williams, Inc.

Senior Account Executive

2007 – 2017

Cambridge Integrated Services, Inc.

Senior Vice President, Claims

2000 – 2007

Gallagher Bassett

Claims Manager/Risk Management Consultant

1995 – 2000

Alexsis, Inc.

Claims Manager/Risk Management Consultant

1991 – 1995

REFERENCES:

New Orleans Aviation Board

Michele Allen-Hart, General Counsel

504-303-7601

Mallen-hart@flymsy.com

City of Houston

Tina Paquet, Assistant Director

832-393-8792

tina.paquet@houstontx.gov

B. Resumes of Team Members

Norm Kessel**Assistant Vice President, Claims Account Executive**

Dallas, Texas

Direct: 469-232-2146 / Mobile: 214-235-5619

Email: nkessel@mcgriff.com

EDUCATION

Bachelor of Science, Business Administration – University of Southern California

LICENSES/CERTIFICATIONS

Texas All Lines Insurance Adjuster, ARM, AIM

AREAS OF EXPERTISE

Multi-Lines Claims and Risk Management
Catastrophic Claims and Litigation Management
Employment Practices Liability
Auditing
TPA Management

RMIS Systems
Claims processing & management
Directors & Officers Liability
Texas Tort Claims Act

YEARS OF EXPERIENCE

Since 2007

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.

Assistant Vice President, Claims and Risk Services

2016 – Present

REFERENCES:

New Orleans Aviation Board
Michele Allen-Hart, General Counsel
504-303-7601
Mallen-hart@flymsy.com

City of Houston
Tina Paquet, Assistant Director
832-393-8792
tina.paquet@houstontx.gov

B. Resumes of Team Members

Doug Keefer

Vice President – Risk Control Consultant

Dallas, Texas

Direct: (469) 232-2130 Mobile: (214) 215-8250

Email: dkeefer@mcgriff.com

EDUCATION

B.S. Degree from Bethel College and a Masters of Science Degree from Baylor University

LICENSES/CERTIFICATIONS

Completed certification courses on ergonomic evaluation/job analysis taught by the center for ergonomics at the University of Michigan & Advanced Ergonomics. He has a Clinical Certification in Functional Capacity Evaluation (Blankenship System) from the Blankenship Corporation. He also is OSHA authorized to conduct 10 & 30-hour outreach safety Training for general industry.

AREAS OF EXPERTISE

Safety/Ergonomic projects that include:

Risk/Loss Control Audits

Safety

Fire Protection

Disaster Recovery/Business Continuity

Workers Compensation Program performance audits (Gap Analysis)

Training

Program Development

In-dept analysis

Inspections

Environmental

CLIENT EXPERIENCE

Alltel Corporation

Whole Foods Market

Treasure Island, Inc.

Blockbuster Corporation

Century Golf Partners

Haggar Clothing

USA Compression

Texas Instruments

Ruffin Companies

City of Fort Worth

Port of San Antonio

LSG Sky Chefs Corporation

L&B Realty Advisors

Nokia Corporation

Republic Plastics, Inc.

Hooters Restaurants

Sony-Ericsson-North

Bimbo Bakeries America

G2 Secure Staff Airline Services

Delta Faucet Company

DFW International Airport

Pier 1 Imports, Inc.

Michelin North America

Tarrant County College Dist.

Food Concepts Intl – Abuelos

City of Tampa

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.

2009 – Present

Vice President – Risk Control Consultant

Benchmark Consulting Group, LLC

2005 – 2008

Safety/Ergonomics Specialist

Marsh USA Inc. – Dallas Office

2002 – 2005

Risk Control Consultant

REFERENCES:

New Orleans Aviation Board

Michele Allen-Hart, General Counsel

504-303-7601

Mallen-hart@flymsy.com

City of Houston

Tina Paquet, Assistant Director

832-393-8792

tina.paquet@houstontx.gov

C. McGriff Culture

Account service is the most important element of the broker evaluation process which the Parish of Jefferson has undertaken. The actual services to be provided by McGriff will be specifically tailored to the requirements which we will jointly identify.

The key to highly successful and effective brokerage team is experience. At McGriff, our goal is to locate, hire and develop the best and brightest people within our industry. Both senior officers and account service staff work to develop partnerships with our clients and maintain in-depth understanding of the unique business environment.

With our dedicated Public Entity Account Team, various team members are available 24 hours a day, 7 days a week to meet any account service needs.

Phone calls and emails are returned promptly and special projects are always handled on a timely schedule.

The Public Entity Team has procedures in place to assure that a Senior Account Team Member is always available to offer assistance and resolve any issues that arise.



Our philosophy on client service rests heavily on McGriff's rich experience, proactive engagement and the consistency to deliver innovative and client-focused solutions. This approach empowers our clients to conduct their business responsibilities and fulfill similar obligations to their customers.

Our staff.

McGriff is committed to hiring, developing and retaining the best and brightest people within our industry. We place an emphasis on hiring individuals that are experienced in the niche industries on which we focus. Our goal is to provide our customers with the highest level of professionalism, creative thinking and service available.

Our structure.

McGriff's organizational structure supports its client-centered approach to doing business. We are a flat organization that operates with a minimum of bureaucracy, each group is uniquely positioned to respond immediately to customer requests.

Our leadership.

Our senior management maintains hands-on involvement with account service activities to ensure the highest level of service and responsiveness. Regardless of what leadership level they have obtained, all of our employees are first and foremost in the insurance business.

Our work product.

Our focus on the customer enables us to provide solutions that are as unique as each of our clients. From comprehensive program design to alternative risk transfer mechanisms, we provide the solution that is the best fit for each client. Throughout the consulting engagement, we never lose sight of who we are working for and continually search for ways to improve and deepen our product and service offerings.

C. Client Satisfaction

Part of McGriff's corporate philosophy is hands-on involvement of senior management personnel in account servicing. Management staff takes part in underwriter negotiations, claims servicing, marketing submissions and more. The Public Entity team has procedures in place to assure that a senior account member is always available to offer assistance and resolve any issues that arise.

With our dedicated account team, various team members are available 24 hours a day, 7 days a week to meet any account service needs. Phone calls and emails are returned promptly and special projects are handled on a timely schedule.

Highly focused brokerage advice and personalized service adds up to top quality risk management programs that get results.

We operate with a minimum of bureaucracy - our group is geared to respond immediately to customer requests. We understand that our viability as a company depends on our ability to meet your needs.

Our boundless dedication to our clients is what truly sets us apart and contributes most to our success. In fact, our client retention rate averages 93%.



C. Overall Quality and Performance

The entire McGriff organization is build around servicing client needs. Our approach to servicing our clients is not a fragmented approach, but a team approach that personally takes responsibility for all facets of our clients' needs.

McGriff's Specialized, Service-Oriented Approach:

- Niche-focused Account Service Team centrally-located and multi-disciplined;
- All team members accountable and involved in day-to-day service functions; 24/7 availability;
- Strong team dynamic; close-knit group. Long-term continuity & extremely low turnover;
- Model promotes creativity, expertise and specialized solutions; provides most direct access to insurance market;
- Model drives innovation, automation, efficiency and data analytics to assist companies achieve their risk goals and objectives;
- Corporate leadership fully integrated into service;
- Dedicated claims team

D. Marketing

Marketing Strategies:

McGriff Insurance Services, LLC utilizes a strategic marketing approach to create the most competitive environment possible for your coverage implementation. Our approach is well known and respects – we are proud to say it is recognized throughout the marketplace and by our clients. We utilize a sequence of proven techniques to market and implement the most beneficial program for you.

Summary

Our marketing process begins with historical data gathering relative to your business operations and associated risks, followed by quantitative analyses to determine the most cost effective balance between retention, coverage limits and premium. We gather input on the desired program from your senior management and contact underwriters regarding potential involvement.

McGriff then develops a conceptual coverage program, and prepares underwriter submissions that present specific program structures and pricing. We use meetings, submissions and underwriter discussions to differentiate our client's unique qualities and merits to avoid classification as a "standard" industry-specific risk. McGriff's underwriter submissions are highly professional, and are distributed to multiple underwriters that are appropriate for our client's industry. We utilize long-standing senior level relationships and market leverage to negotiate the most beneficial terms with selected underwriters. Our proactive approach has produced successful programs for hundreds of clients, and has earned us the reputation for technical expertise and creativity that McGriff enjoys today.

No "Marketing Directives"

Another significant difference between our marketing process and that of our competition is that our marketing efforts are 100% client driven. As many of our competitors move towards "marketing directives" – business driven to selected markets based on volume – and marketing centers, McGriff concentrates solely on the needs of our clients. We represent carriers where we have a significant amount of business; however, we believe that the specifics of each account should dictate where coverage is placed. There is more to selecting an insurance company than the strength of a "back-room agreement" or agency contract.

Marketing and Placement Overview Beginning Reviews:

Loss History - Review Loss History over a period of 5-10 years. We will stratify losses by category and size.

Risk Appetite – conduct in-depth discussions with your team to allow us to understand your risk appetite which is critical to our review of your program design. Understanding your priorities allows us to suggest retentions and limits and creates a mutually agreed strategy for overall program structure.

Risk Profile – using various proprietary analytics we review the program risk characteristics. We will also evaluate key risk components such as Flood Zone exposure, Wind/Hail Exposure, Named Storm Exposure, probably Maximum Loss, Values by construction code, Cyber, Law Enforcement Liability, Public Officials Liability, Employment Practices, Aviation, and Terrorism exposure amongst other perils.

Coverage – we will review all current binders, policies and endorsements in an effort to identify coverage gaps and opportunities to improve the structure and terms.

McGriff's quantitative analysis process for recommending appropriate and advantageous coverage for the Parish of Jefferson's insurance program include but are not limited to:

- Analysis of Risk Modeling Database
- Analysis of Exposures by Coverage
- Analysis of Current Coverage
- Development of values by zip code, construction, etc.
- Review of historical claims data

Once we have completed the data gathering and quantitative analysis steps, we will meet with you to develop a strategy.

D. Marketing Approach

McGriff Insurance Services, LLC utilizes a strategic marketing approach to create the most competitive environment possible for your coverage implementation. Our approach is well known and respected – we are proud to say it is recognized throughout the marketplace and by our clients. We utilize a sequence of proven techniques to market and implement the most beneficial program for you.

Our marketing process begins with historical data gathering relative to your business operations and associated risks, followed by quantitative analyses to determine the most cost-effective balance between retention, coverage limits and premium. We gather input on the desired program from your senior management and contact underwriters regarding potential involvement.

McGriff then develops a conceptual coverage program and prepares underwriter submissions that present specific program structures and pricing. We use meetings, submissions and underwriter discussions to differentiate our client's unique qualities and merits to avoid classification as a "standard" industry-specific risk. McGriff's underwriter submissions are highly professional and are distributed to multiple underwriters that are appropriate for our client's industry. We utilize long-standing senior level relationships and market leverage to negotiate the most beneficial terms with selected underwriters. Our proactive approach has produced successful programs for hundreds of clients and has earned us the reputation for technical expertise and creativity that McGriff enjoys today.

Another significant difference between our marketing process and that of our competition is that our marketing efforts are still 100% client driven. As many of our competitors move towards "marketing directives" – business driven to selected markets based on volume – and marketing centers, McGriff concentrates solely on the needs of our clients. We represent carriers where we have a significant amount of business, however, we believe that the specifics of each account should dictate where coverage is placed. McGriff may utilize a wholesale broker to help structure a program that is advantageous to the Parish of Jefferson, from a layering and pricing perspective.

McGriff strongly recommends personal meetings between our clients, their incumbents, and potential underwriters. It is critical that the underwriting community have a balanced perspective of the issues confronting your business and the means by which your executive management identifies and mitigates its risk. It is also important to clearly communicate your service expectations to potential carriers. One of the most important parts of our role as your broker would be to ensure that you are meeting with the key decision-makers, and to prepare you for these meetings so that they are the most effective use of everyone's time.

Summary of Services:

- Insurance Marketing/Bid
 - Develop marketing strategy in conjunction with the Parish of Jefferson 120 days prior to renewal.
 - ✓ Gather Data
 - ✓ Prepare Submission
 - ✓ Negotiate with Underwriters
 - ✓ Obtain Quotes
 - ✓ Do Proposal – to be presented 45 days prior to renewal.
 - ✓ Final recommendations due 20 days prior to renewal for approval
 - ✓ Parish's Approval
 - ✓ Place and Bind Coverage – Binders delivered 15 days prior to renewal
 - ✓ Policy Review with specifications
 - ✓ Ongoing daily service associated with policies.

Note that our following program development is McGriff's standards for renewals. We have amended a schedule to reflect time guidelines required by the Parish.

D. Marketing and Timeline – Program Development

Below is an outline of our five (5) Program Development Process phases:

PHASE 1: Renewal Strategy & Analysis Meeting

(THREE TO FOUR months prior to renewal)

After implementing the Transition Plan and having identified the Parish of Jefferson's key priorities and coverage goals, we meet to discuss the state of the insurance market, expectations, re-confirm goals, and establish due dates for the balance of the process. The renewal strategy document and meeting will provide the following information:

- Analyze and highlight potential concerns relative to specific exposures and/or industry exposures
- Benchmark coverage, limits, and price versus peer group;
- Outline coverage alternatives/recommendations;
- Outline structural alternatives/recommendations;
- Establish clear specifications on the goals for the renewal; and
- Establish due dates for underwriting meetings, proposals and binding dates.

PHASE 2: Collection of Underwriting Information and Preparing for Meetings

(TWO TO THREE MONTHS PRIOR TO RENEWAL)

About the same time as the renewal strategy meeting, we will send a data request to you identifying specific underwriting information required and providing required carrier applications which will accurately reflect your risk profile for the coming term. We will work collaboratively with your team to prepare the documentation, including the presentation to be given at the underwriting meetings, and then distribute the information to the markets with ample time for their complete and thorough review before the underwriting meeting.

We will work with the Parish to jointly establish the optimal deadlines to receive the initial request for data and delivery of completed submission information to allow enough time for the balance of the marketing process.

PHASE 3: Conduct Underwriter Meetings and negotiations

(TWO MONTHS PRIOR TO RENEWAL)

The underwriting meeting provides the Parish a forum to deliver additional information and color around the operations and goals that cannot be gleaned from submissions and analyst reports.

The goals of the meeting, and the direct negotiations, are to (1) differentiate the Parish from your peers, and (2) achieve the coverage, limit, retention and pricing parameters established during the renewal strategy meeting. Developing and reinforcing long-term partnerships with carriers who are true business partners of the Parish, and McGriff's, are keys to driving successful results.

Keys to successful meetings and negotiations:

- Highlight the favorable risk attributes and proactively address the perceived drawbacks;
- Rely on logical, fact-based arguments when negotiating terms and work collaboratively between the Parish and the insurance partners to drive successful, amicable outcomes for all parties. This approach facilitates longer-term relationships and more predictable year-over-year results. These relationships are also meaningful in claims and settlement negotiations;
- Meet with decision makers (at least on the primary and potential primary carriers);
- Take advantage of competitive markets and levers to drive success; and
- Leverage incumbent markets and other valuable partners to secure the desired results.

D. Marketing and Timeline – Program Development

PHASE 4: Assessing Options and Final negotiations

(ONE TO TWO MONTHS PRIOR TO RENEWAL)

A thorough review and consideration of all viable options/alternatives secured during the marketing process will assist you in the determination of the best approach going forward. Considerations of coverage terms and conditions, retentions, premiums, program sub-limits, insurer relationships, and aggregations need to be factored into the equation. We will review and discuss all structure and potential market alternatives that will build the optimum program for you. This will include the quantitative and qualitative analysis of all available options prior to implementing the final renewal process of binding coverage.

Key steps in the Assessment Phase will include:

- McGriff to evaluate quotations and coverage forms, especially reductions or extensions of coverage;
- Review carrier servicing abilities in terms of underwriting, claims, and loss control;
- Benchmark results against the Parish's Peer Group; and
- Re-approach markets with final requests for amendments and changes to program options provided.
- A final proposal will be delivered and reviewed with you well in advance of the renewal date, ideally at least two to four weeks prior to the effective date.

The Renewal Proposal will include the following:

- Executive summary – a recap of marketing efforts and results, including performance on key renewal goals established in the previous renewal strategy meeting;
- Detailed descriptions of coverage changes and options;
- Detailed limit, retention, and premium summary with year-over-year comparisons;
- Schematics of expiring and proposed program structures;
- Detailed quote outlines for each line of coverage;
- Actual copies of carrier quotes and binders if desired; and
- Schedule of open items to be completed prior to binding.

PHASE 5: Program Placement / Implementation (At Inception)

Following our collaborative analysis of your options, we will bind coverage upon your instruction. Coverage binders and invoicing will be delivered immediately, and a detailed Confirmation of Coverage will be provided should you need to refer to details of the bound program prior to receipt of executed policies. Upon receipt of insurer-issued policies, McGriff will review for accuracy, request corrections where required, and monitor that such requests be completed in a timely manner, providing updates to the Parish, as desired. McGriff will issue invoices, collect payment from the Parish and remit to the applicable insurance carriers.


Moving forward, McGriff will work with the Parish to answer all coverage questions that may arise. We will issue certificates of insurance to all interested parties as directed by the Parish.

ATTACHMENT E

LIST OF PRIOR² OR CURRENT PUBLIC ENTITY ACCOUNTS

Name of Firm: McGriff Insurance Services, LLC

PUBLIC ENTITY Address	PERIOD HANDLED	CONTACT PERSON Phone Number
1) St. Tammany Parish Government <u>21454 Koop Dr., Ste 2G</u> Mandeville, LA 70471	<u>2014 - Current</u> 10 years	<u>Andrea Kuracka</u> 985-898-5226
2) Lafayette Airport Commission <u>222 Jet Ranger X Dr.</u> Lafayette, LA 70508	<u>2016 - Current</u> 8 years	<u>Rene' Cotton</u> 337-266-4403
3) City of New Orleans <u>1300 Perdido St., #9E-06</u> New Orleans, LA 70112	<u>2014 - Current</u> 10 years	<u>Eldridge Morris</u> 504-658-8909
4) New Orleans Aviation Board <u>P.O. Box 20007</u> New Orleans, LA 70141	<u>2013 - Current</u> 11 years	<u>Michele Allen-Hart</u> 504-303-7601
5) City of Houston <u>611 Walker, 13th Floor</u> Houston, TX 77002	<u>2014 - Current</u> 10 years	<u>Tina Paquet</u> 832-393-8792
6) Port of Houston Authority <u>111 East Loop North</u> Houston, TX 77029	<u>2009 - Current</u> 15 years	<u>Norma Essary</u> 713-670-2821



Signature

5/2/2024

Date

Producer

Title

To provide additional Accounts, make copies of this page.

PLEASE NOTE: Jefferson Parish reserves the right to verify any information provided herein.

² Within the last 10 years.

ATTACHMENT E

LIST OF PRIOR² OR CURRENT

PUBLIC ENTITY ACCOUNTS

Name of Firm: McGriff Insurance Services, LLC

PUBLIC ENTITY Address	PERIOD HANDLED	CONTACT PERSON Phone Number
--------------------------	----------------	--------------------------------

1) City of Tampa 306 E. Jackson St., Ste 3E Tampa, FL 33602	2009 - Current 15 years	Valerie Horton-Rakes 813-274-5737
---	----------------------------	--------------------------------------


2) _____

3) _____

4) _____

5) _____

6) _____


Signature

5/2/2024
Date

Producer
Title

To provide additional Accounts, make copies of this page.

PLEASE NOTE: Jefferson Parish reserves the right to verify any information provided herein.

² Within the last 10 years.

Experience – Partial Client List

McGriff has been providing insurance brokerage services for over 100 years. McGriff was founded in 1886.

Similar Accounts: [PARTIAL CLIENT LIST](#)

Account Name	# of year serviced
Port of Houston Authority, Texas	15
City of Houston, Texas	10
Port Authority of San Antonio, Texas	13
Harris County, Texas	20
Northside Independent School District, Texas	24
Bexar County, Texas	15
Texas Municipal Power Agency, Texas	24
Tarrant County College District, Texas	14
City of Corpus Christi, Texas	7
Jefferson County, Texas	13
Via Metro, Texas	22
City of Irving, Texas	22
Richardson Independent School District, Texas	26
Garland Independent School District, Texas	21
Mesquite Independent School District, Texas	17
Grand Prairie Independent School District, Texas	5
Plano Independent School District, Texas	6
City of Tampa, Florida	15
City of Dallas, Texas	4
City of Greenville, Texas	9
City of Miami Beach, Florida	5
City of Tallahassee, Florida	3
City of Wentzville, Missouri	3
Dallas County, Texas	10
CMC Railroad, Texas	11
Lafayette Airport Commission, Louisiana	8
City of New Orleans, Louisiana	10
New Orleans Municipal Yacht Harbor, Louisiana	9
City of New Orleans Healthcare for the Homeless, Louisiana	9
Greater New Orleans Expressway Commission, Louisiana	6
New Orleans Aviation Board, Louisiana	11
St. Tammany Parish Government, Louisiana	10
City of East Point, Georgia	2
City of Oklahoma City, Oklahoma	2

Success Stories

The City of Houston encompasses six counties with a total population approaching 6 million, employs over 22,000 people and has property values in excess of \$10 billion all situated in a Tier 1 Named Storm area. McGriff took over as the Broker of Record for the City of Houston in 2014 and accomplished the following goals:

- Increased Flood Zone A, Debris Removal, Errors & Omissions, and Unnamed Locations sub-limits, among others, significantly.
- Decreased the All Other Perils deductible 22 days before the City suffered a \$2 Million dollar loss at one of their locations which would not have been covered under the expired program.
- Decreased the flood deductible before the City suffered a flood loss in excess of \$20 Million. The change in deductibles made a significant impact on the loss payment from the carriers.
- **Reduced the Property Program premium by \$1.3 Million.**
- Significantly increased the City's Terrorism coverage.
- Reduced the City's Terrorism deductible while reducing the City's annual Terrorism premium by \$139,845.
- 2017 renewal included a 4% rate reduction while lowering the cap on the Named Storm Deductible by 25%.



The City of Tampa – McGriff took over as the City's Broker of Record in 2008. Since then we have;

- Increased their Property Loss Limit Sub-limits to better reflect the City's needs.
- Increased the City's Named Windstorm and Flood Limits by 43%.
- Increased the City's primary Flood coverage with the National Flood Insurance Program by 68% while reducing the premiums for these policies by 42%.
- Establish a Bridge Insurance Program for 42 of the City's Bridges.
- Reduced the Premium for the City's Aviation coverage by 51%.
- **Overall reduced the City's expiring insurance by \$987,204 in the first year.**



The Port of Houston Authority ("PHA") of Harris County, Texas is an independent political subdivision created under the Constitution of the State of Texas. The PHA owns and operates the public facilities located on the Houston Ship Channel. McGriff became the broker of record for the Port of Houston in 2009. During the first renewal process in 2010, McGriff accomplished the following goals:


- Revamped the property and casualty coverage forms and limits provided.
- Changed casualty program from large deductible to Self Insured with retentions.
- Increased property limits and enhanced coverage.
- Did a complete evaluation of property values and exposure information (providing better underwriting information for marketing efforts).
- **Reduced overall annual premiums in excess of \$1,000,000 savings.**
- Assisted with large hurricane claim that had previously been in dispute.
- **McGriff has helped the Port of Houston accomplish a total cost of risk decrease of 28% over four (4) years, or a cumulative total cost of risk decrease of \$7,373,219.**



ATTACHMENT F
LIST OF ACCOUNTS WITH TOTAL COST OF RISK IN EXCESS OF
\$5,000,000³

Name of Firm: McGriff Insurance Services, LLC

ACCOUNT NAME Address	PERIOD HANDLED Cost of Risk	CONTACT PERSON Phone Number
1) New Orleans Aviation Board P.O. Box 20007 New Orleans, LA 70141	2013 - Current est. \$6.5 mil	Michele Allen-Hart 504-303-7601
2) St. Tammany Parish Government 21454 Koop Drive, Ste 2G Mandeville, LA 70471	2014 - Current est. \$6 mil	Andrea Kuracka 985-898-5226
3) City of Houston 611 Walker, 13th Floor Houston, TX 77002	2015 - Current est. \$20 mil	Tina Paquet 832-393-8792
4) Port of Houston Authority 111 East Loop North Houston, TX 77029	2009 - Current est. \$8.6 mil	Norma Essary 713-670-2821
5) City of Tampa 306 E. Jackson St., Ste 3E Tampa, FL 33602	2009 - Current est. \$15 mil	Valerie Horton-Rakes 813-274-5747
6) _____		



Signature

5/2/2024

Date

Producer
Title

It is not necessary to list six (6) accounts with total cost of risk in excess of \$5,000,000 to meet the minimum requirements.

PLEASE NOTE: Jefferson Parish reserves the right to verify any information provided herein.

³ Within the last 10 years.

ATTACHMENT G

FEE SCHEDULE

Name of Firm McGriff Insurance Services, LLC

JP Property, Casualty, and Liability Insurance including NFIP coverages:

Please provide a compensation flat fee schedule for the periods indicated below using data outlined in Part 2 Scope of Services, Part 1.4.D, and Attachment B of the SOQ. Please note: flat fee will exclude NFIP commissions; commissions for NFIP will be paid in addition to and separately from the agreed upon flat fee.


TERM	FEE
09/01/2024-25	\$20,000
09/01/2025-26	\$20,000
09/01/2026-27	\$20,000
09/01/2027-28	\$20,000

If applicable, please disclose any additional fees for technology or technology-related services.

None

In necessary, do you agree to accept any or all of the annual fees indicated above in monthly payments? Yes.

If you do not agree, please indicate your proposed payment scheme:


Signature

5/2/2024
Date

Producer
Title

General Professional Services Questionnaire Instructions

- The General Professional Services Questionnaire shall be used for all professional services except outside legal services and architecture, engineering, or survey projects.
- **The General Professional Services Questionnaire should be completely filled out. Complete and attach ALL sections. Insert “N/A” or “None” if a section does not apply or if there is no information to provide.**
- Questionnaire must be signed by an authorized representative of the Firm. Failure to sign the questionnaire shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- All subcontractors must be listed in the appropriate section of the Questionnaire. Each subcontractor must provide a complete copy of the General Professional Services Questionnaire, applicable licenses, and any other information required by the advertisement. Failure to provide the subcontractors' complete questionnaire(s), applicable licenses, and any other information required by the advertisement shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- If additional pages are needed, attach them to the questionnaire and include all applicable information that is required by the questionnaire.

General Professional Services Questionnaire

A. Project Name and Advertisement Resolution Number:

Insurance Producer of Record Services for its Property & Casualty Insurance Program
SOQ No. 24-010

B. Firm Name & Address:

McGriff Insurance Services, LLC
3850 N. Causeway Blvd., Suite 1970
Metairie, LA 70002

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:

Hank Wolf-Producer/Agent

D. Address of principal office where Project work will be performed:

3850 N. Causeway Blvd., Suite 1970
Metairie, LA 70002

E. Is this submittal by a JOINT-VENTURE? Please check:

YES ☐ NO ☒

If marked "No" skip to Section H. If marked "Yes" complete Sections F-G.

F. If submittal is by JOINT-VENTURE, list the firms participating and outline specific areas of responsibility (including administrative, technical, and financial) for each firm. Please attach additional pages if necessary.

1.

2.

General Professional Services Questionnaire

G. Has this JOINT-VENTURE previously worked together? Please check: YES ☐ NO ☐

H. List all subcontractors anticipated for this Project. Please note that all subcontractors must submit a fully completed copy of this questionnaire, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.

Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. No Subcontractors		
2.		
3.		
4.		
5.		

General Professional Services Questionnaire

I. Please specify the total number of support personnel that may assist in the completion of this Project: 14 _____
J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.
PROFESSIONAL NO. 1
Name & Title:
Hank Wolf, Producer/Agent
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Team Leader - Daily Management & Client Contact Programs Designs and Marketing Oversight
Years' experience with this Firm:
15 Years
Education: Degree(s)/Year/Specialization:
Louisiana State University - BS Finance
Other experience and qualifications relevant to the proposed Project:
30+ years experience in Claims, Risk Management and Brokerage Services

Resumes of Team Members

Hank Wolf

Team Leader/Producer

Metairie, Louisiana

Direct: 504-831-7208 Mobile: 504-450-3602

Email: hwolf@mcgriff.com

EDUCATION

Louisiana State University, B.S. Finance

LICENSES/CERTIFICATIONS

Property and Casualty Producer License: LA, TX, MS

Life & Health Producer License: LA, TX, MS

AREAS OF EXPERTISE

Public Entities / Governmental Risk Management

Relationship Management

Program Design, Marketing, Placement & Servicing of

Energy, Marine & Commercial Risks

Claims Management

CLIENT EXPERIENCE

Public Entities

Energy & Marine

Manufacturing

Transportation

Retail

Environmental

Hotel/Restaurant

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

30+ years of experience in Claims and Risk Management

EXPERIENCE HISTORY

McGriff, Seibels & Williams, Inc. now McGriff Insurance Services, Inc.

2008 – Present

Team Leader/Producer

Marsh USA

2003 – 2008

Senior Vice President

Brown & Co.

1983 – 2003

Vice President

REFERENCES:

City of New Orleans

Eldridge Morris, Risk Manager

504-658-8909

eldridge.morris@nola.gov

St. Tammany Parish Government

Andrea L. Kuracka, Risk Manager

985-898-5226

alkuracka@stpgov.org

General Professional Services Questionnaire

PROFESSIONAL NO. 2
Name & Title:
Johnny Fontenot, Executive Vice President
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Assistance with Daily Management & Program Oversight
Years' experience with this Firm:
26
Education: Degree(s)/Year/Specialization:
McNeese State University - BS Management and Marketing
Other experience and qualifications relevant to the proposed Project:
25+ years Claims, Risk Management and Brokerage Service Designations: Chartered Property Casualty Underwriter (CPCU) Associate in Claims (AIC) Associate in Risk Management (ARM)

Resumes of Team Members

Johnny Fontenot, CPCU, AIC, ARM

Executive Vice President, Head of Office

Dallas, Texas

Direct: 469-232-2160 Mobile: 214-244-1631

Email: jfon@mcgriff.com

EDUCATION

McNeese State University, B.S. Management and Marketing

LICENSES/CERTIFICATIONS

Chartered Property & Casualty Underwriter

Associate Risk Manager

Associate in Claims

Licensed Risk Manager

AREAS OF EXPERTISE

Public Entities / Governmental Risk Management

Owner Controlled Insurance Programs (OCIPs)

Governmental Risk Pools

Large Commercial Accounts

Claims

CLIENT EXPERIENCE

Public Entities

Manufacturing

Retail

Hotel/Restaurant

Energy & Marine

Transportation

Environmental

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

20+ years of experience in Claims and Risk Management

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.

2010 – Present

Executive Vice President, Head of Office

McGriff, Seibels & Williams, Inc.

1998 – 2010

Senior Vice President, Public Entity Division

Sedgwick, Inc.

1993 – 1998

Vice President, Public Entity Division

City of Garland

1992 – 1993

Risk Manager

City of Beaumont

1986 – 1992

Risk Manager

REFERENCES:

City of Tampa

Valerie Horton-Rakes, Risk Manager

813-274-5737

Valerie.hortonrakes@tampagov.net

City of New Orleans

Eldridge Morris, Risk Manager

504-658-8909

Eldridge.morris@nola.gov

General Professional Services Questionnaire

PROFESSIONAL NO. 3
Name & Title:
Robert Waggoner, Senior Vice President
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Account Executive- Special Project Resource Collateral Reviews - Technical Resource
Years' experience with this Firm:
21 years
Education: Degree(s)/Year/Specialization:
Texas A&M University -BS Psychology/Management
Other experience and qualifications relevant to the proposed Project:
20+ years Public Entities Management and Risk Management Designations- Associate Risk Manager (ARM) Certified Governmental Benefits Administrator (CGBA)

Resumes of Team Members

Robert Waggoner, ARM, CGBA**Senior Vice President, Account Executive**

Dallas, Texas

Direct: 469-232-2140 Mobile: 214-649-6625

Email: rwaggoner@mcgriff.com**EDUCATION**

Texas A & M University, B.S. Psychology/Management

LICENSES/CERTIFICATIONS

Associate Risk Manager

Certified Governmental Benefits Administrator

AREAS OF EXPERTISE

Public Entities / Governmental Risk Management

Workers' Compensation

Property

Loss Control and Safety Programs

General/Auto Liability

CLIENT EXPERIENCE

Public Entities

Manufacturing

Retail

Hotel/Restaurant

Energy & Marine

Transportation

Environmental

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

20+ years of experience in Claims and Risk Management

EXPERIENCE HISTORY*McGriff Insurance Services, Inc.**2003 – Present*

Vice President/Senior Vice President

*City of Denton**2000 – 2003*

Risk Manager

*City of Garland**1995 – 2000*

Risk Specialist

*James Helwig & Son Trucking**1994 – 1995*

Safety Director

*Stevens Transport**1990 – 1994*

Safety & Training Coordinator

REFERENCES:

New Orleans Aviation Board

Michele Allen-Hart, General Counsel

504-303-7601

Mallen-hart@flymsy.com

City of Houston

Tina Paquet, Assistant Director

832-393-8792

tina.paquet@houstontx.gov

General Professional Services Questionnaire

PROFESSIONAL NO. 4
Name & Title:
John F. Palm, III- Vice President
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Support Special Projects Contract Review Claims and Loss Control Assistance
Years' experience with this Firm:
6 years
Education: Degree(s)/Year/Specialization:
University of Southern Mississippi - MPH Occupational Health & Safety BS Psychology
Other experience and qualifications relevant to the proposed Project:
21 Years experience in Safety, Loss Control and Risk Management Designations - Associate in Risk Management (ARM)

Resumes of Team Members

John F. Palm III, ARM

Assistant Vice President, Account Executive

Metairie, Louisiana

Direct: 504-832-2681 Mobile: 214-878-5687

Email: jpalm@mcgriff.com

EDUCATION

University of Southern Mississippi, MPH Occupation Health & Safety

University of Southern Mississippi, BS Psychology

LICENSES/CERTIFICATIONS

Associate in Risk Management

AREAS OF EXPERTISE

School Risk Management Programs

Workers' Compensation

Campus Security

Loss Control and Safety Programs

Property/Casualty Programs

Contracts & Agreements

CLIENT EXPERIENCE

Public Entities

Municipalities

Schools

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.

Account Executive

2018 – Present

Allen Independent School District

Director of Risk Management

2013 – 2018

Mesquite Independent School District

Risk Management & Operations Manager

2011 – 2013

Mesquite Independent School District

Safety Officer

2006 – 2011

United Rentals

Risk Control Manager

2004 – 2006

Center for Technology & Environmental Health

Industrial Hygienist/Safety Manager

2001 – 2004

REFERENCES:

New Orleans Aviation Board

Michele Allen-Hart, General Counsel

504-303-7601

Mallen-hart@flymsy.com

St. Tammany Parish

Andrea L. Kuracka, Risk Manager

985-898-5226

alkuracka@stpgov.org

General Professional Services Questionnaire

PROFESSIONAL NO. 5
Name & Title:
Tom Keel, Account Executive
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Assistance with Loss Control, Safety and Special Projects
Years' experience with this Firm:
4 years
Education: Degree(s)/Year/Specialization:
Midwestern State University - BAAS Public Administration University of North Texas - Masters in Public Administration
Other experience and qualifications relevant to the proposed Project:
Associate in Risk Management (ARM) Licensed Risk Manager Certified Safety and Health Official (CSHO)

Resumes of Team Members

Tom Keel, MPA, ARM, CSHO**Account Executive**

Dallas, Texas

Mobile 469-203-7759

Email: tom.keel@mcgriff.com

EDUCATION

Midwestern State University, B.A.A.S. Public Administration

University of North Texas, Masters in Public Administration

LICENSES/CERTIFICATIONS

Associate Risk Manager (ARM)

Licensed Risk Manager in Texas

General Lines Agent – Property & Casualty

Certified Safety and Health Official (CSHO)

Licensed Adjuster – All Lines

Licensed Firefighter and EMT

AREAS OF EXPERTISE

Public Entities / Governmental Risk Management

Workers' Compensation

Property

Loss Control and Safety Programs

General/Auto Liability

Claims Management

CLIENT EXPERIENCE

Public Entities

Housing Authority

Commercial Construction

Education

Transportation

EXPERIENCE HISTORY

McGriff Insurance Services

Insurance Industry

2020 - Present

27 Years

USCG and US Army Veteran

Prior Risk Manager for the Dallas Housing Authority and interim Risk Manager for the City of Denton

REFERENCES:

City of Tampa

Valerie Horton-Rakes, Risk Manager

813-274-5737

Valerie.hortonrakes@tampagov.net

City of Houston

Tina Paquet, Assistant Director

832-393-8792

tina.paquet@houstontx.gov

General Professional Services Questionnaire

PROFESSIONAL NO. 6
Name & Title:
Rachel Becerra, Assistant Vice President
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Marketing Account Executive Program Submission and Proposal
Years' experience with this Firm:
24 years
Education: Degree(s)/Year/Specialization:
Trinity Valley Community College
Other experience and qualifications relevant to the proposed Project:
20+ years Customer Service and Account management experience Also has the following designations: Accredited Customer Service Representative (ACSR)

Resumes of Team Members

Rachel Becerra, ACSR**Assistant Vice President, Marketing Account Executive**

Dallas, Texas

Direct: 469-232-2172 Mobile: 469-644-6502

Email: rachel.becerra@mcgriff.com**EDUCATION**

Trinity Valley Community College

LICENSES/CERTIFICATIONS

Accredited Customer Service Representative (ACSR)

1 part of 5 Certified Risk Manager (CIC)

3 Parts of 4 Certified School Risk Manager (CSRM)

AREAS OF EXPERTISE

Public Entities

Higher Education

CLIENT EXPERIENCE

Public Entities

Manufacturing

Transportation

Hotel/Restaurant

Retail

Environmental

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

20+ years of experience in Customer Service and Account Management

EXPERIENCE HISTORY*McGriff Insurance Services, Inc.**2000 – Present*

Assistant Vice President, Senior Account Manager

*Aon Risk Services, Inc.**1997 – 2000*

Assistant Account Service Representative

*Liberty Mutual Insurance Company**1995 – 1997*

Claims Call Director

REFERENCES:

New Orleans Aviation Board

Michele Allen-Hart, General Counsel

504-303-7601

Mallen-hart@flymsy.com

St. Tammany Parish Government

Andrea L. Kuracka, Risk Manager

985-898-5226

alkuracka@stpgov.org

General Professional Services Questionnaire

PROFESSIONAL NO. 7
Name & Title:
Jackie Day, Senior Vice President
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Marketing Account Executive - Large Public Entity Accounts
Years' experience with this Firm:
26 years
Education: Degree(s)/Year/Specialization:
Mesa College - Business Administration
Other experience and qualifications relevant to the proposed Project:
25+ years Marketing/Account Service Experience Also has the following designations: Chartered Property & Casualty Underwriter (CPCU) Certified Insurance Counselor (CIC) Accredited Adviser in Insurance (AAI)

Resumes of Team Members

Jackie Day, CPCU, CIC, AAI

Senior Vice President/Marketing AE

Dallas, Texas

Direct: 469-232-2162 Mobile: 469-766-7525

Email: jday@mcgriff.com

EDUCATION

Mesa College, Colorado

LICENSES/CERTIFICATIONS

Chartered Property & Casualty Underwriter

Certified Insurance Counselor

Accredited Adviser in Insurance

AREAS OF EXPERTISE

Public Entities / Governmental Risk Management

Property

Design, marketing and servicing of major commercial accounts

CLIENT EXPERIENCE

Public Entities

Hotel/Restaurant

Manufacturing

Retail

Transportation

Environmental

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

25+ years of experience Insurance Marketing

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.

1998 – Present

Senior Vice President/Marketing Account Executive

Sedgwick, Inc.

1994 – 1998

Account Executive, Public Entity Division

Dexter & Company

1987 – 1994

Commercial Lines Manager

REFERENCES:

New Orleans Aviation Board

City of Houston

Michele Allen-Hart, General Counsel

Tina Paquet, Assistant Director

504-303-7601

832-393-8792

Mallen-hart@flymsy.com

tina.paquet@houstontx.gov

General Professional Services Questionnaire

PROFESSIONAL NO. 8
Name & Title:
Addie Liebel, Senior Vice President
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Marketing Account Executive
Years' experience with this Firm:
19 years
Education: Degree(s)/Year/Specialization:
Delgado Community College, Associate of Business Administration
Other experience and qualifications relevant to the proposed Project:
30+ years Marketing/Account Service

Resumes of Team Members

Addie Liebel

Senior Vice President/Marketing Account Executive Direct: 504-831-7205 Mobile: 504-495-8421
Metairie, Louisiana Email: aliebel@mcgriff.com

EDUCATION

Associate of Business Administration, Delgado Community College

LICENSES/CERTIFICATIONS

Property and Casualty Producer License, LA
Surplus Lines Brokers License, LA

AREAS OF EXPERTISE

Production, program design, marketing, placement and servicing of Marine & Energy Risks
Marine Hull, Protection & Indemnity, Cargo, Builders Risk, Maritime Employers Liability, Marine General Liability, Ship Repairers Legal Liability, Vessel Pollution Liability
Experience negotiating risk placements
Contract evaluation relative to insurance requirements

CLIENT EXPERIENCE

Marine Public Entity
Maritime

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

30+ years of experience Insurance Marketing and Account Service

EXPERIENCE HISTORY

<i>McGriff Insurance Services, Inc.</i>	2005 – Present
Senior Vice President/Marketing Account Executive	
<i>Marsh USA</i>	2003 – 2005
Account Executive	
<i>Gulf Coast Marine, Inc.</i>	1998 – 2003
Underwriter/Broker	
<i>Sedgwick James of New Orleans, Inc.</i>	1997 – 1998
Account Executive/Producer	
<i>Trident Marine Managers, Inc.</i>	1991 – 1997
Broker/Service Administrator	
<i>Mid-Gulf Agency, Inc.</i>	1986 – 1991
Service Representative	

REFERENCES:

Plaquemines Port Harbor & Terminal District
Christie Nielsen, Director of Administration/HR
504-682-7920
cnielsen@pphtd.com

Broussard Brothers, Inc.
Torie Theriot, General Counsel
337-892-4149
toriet@broussardbrothers.com

General Professional Services Questionnaire

PROFESSIONAL NO. 9
Name & Title:
Jennifer Falldine, Account Manager
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Daily Customer Service
Years' experience with this Firm:
2 years
Education: Degree(s)/Year/Specialization:
Hillsborough Community College, BA Oklahoma State University, Business Accounting
Other experience and qualifications relevant to the proposed Project:
17 years Account Service and Account Management experience

Resumes of Team Members

Jennifer Falldine, ACSR, CAM**Account Manager**

Dallas, Texas

Direct: 469-232-2142 Mobile: 214-566-5273

Email: Jennifer.falldine@mcgriff.com

EDUCATION

Hillsborough Community College – Business Administration

Oklahoma State University – Business/Accounting Major

LICENSES/CERTIFICATIONS

General Lines Texas Insurance Agent

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

17 Year in the Insurance Industry

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.

April 2022 – Present

Account Manager

Sleeper Sewell

2021 – 2022

Account Manager

BevCap Management

2019 – 2022

Account Manager

CoVerica

2012 – 2019

Account Manager

Roach Howard Smith & Barton

2005 – 2012

Senior Account Manager

REFERENCES:

New Orleans Aviation Board

City of Houston

Michele Allen-Hart, General Counsel

Tina Paquet, Assistant Director

504-303-7601

832-393-8792

Mallen-hart@flymsy.com

tina.paquet@houstontx.gov

General Professional Services Questionnaire

PROFESSIONAL NO. 10
Name & Title:
Amy Sierp, Senior Client Service Specialist
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Daily Account Service Assistance
Years' experience with this Firm:
1 year
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:
Experience Client Service

Resumes of Team Members

Amy Sierp**Senior Client Service Specialist**

Addison, Texas

Direct: 469-232-2123

Email: Amy.Sierp@mcgriff.com**EDUCATION**

Plano East Senior High

LICENSES/CERTIFICATIONS

Property and Casualty Agent License: Texas

AREAS OF EXPERTISE

Property
General Liability
Automobile Liability
Workers' Compensation
Public Entities

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

2 Years Experience in Commercial Insurance Account Management

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.- Dallas
Senior Client Service Specialist

2023 - Present

Sleeper Sewell- Dallas
Account Manager

*2021***REFERENCES:**

City of Houston
Tina Paquet, Assistant Director
832-393-8792
tina.paquet@houstontx.gov

St. Tammany Parish Government
Andrea L. Kuracka, Risk Manager
985-898-5226
alkuracka@stpgov.org

General Professional Services Questionnaire

PROFESSIONAL NO. 11
Name & Title:
Jackie Morris, Senior Client Service Specialist
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Daily Service Assistance Certificates of Insurance Management of Flood Policies
Years' experience with this Firm:
1 year
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:
10 years experience in Account Management and Customer Service

Resumes of Team Members

Jacqueline Morris**Senior Client Service Specialist**

Addison, Texas

Direct: 469-232-2109

Email: Jacqueline.Morris@mcgriff.com

EDUCATION

Crockett High School – Austin, TX

LICENSES/CERTIFICATIONS

Property and Casualty Agent License: Texas

AREAS OF EXPERTISE

Property

General Liability

Automobile Liability

Workers' Compensation

Public Entities

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

10 Years Experience in Commercial Insurance Account Management

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.- Dallas

2023 - Present

Senior Client Service Specialist

RISKPRO Insurance Agency, LLC

2015-2023

Account Manager

REFERENCES:

New Orleans Aviation Board

Michele Allen-Hart, General Counsel

504-303-7601

Mallen-hart@flymsy.com

Plano Independent School District

Darla Bishop, Risk Manager

469-752-4792

darla.bishop@pisd.edu

General Professional Services Questionnaire

PROFESSIONAL NO. 12
Name & Title:
Travis Nixon, Senior Vice President
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Claims & Risk Services Manager
Years' experience with this Firm:
17 years
Education: Degree(s)/Year/Specialization:
University of Texas
Other experience and qualifications relevant to the proposed Project:
20+ years Claims experience and Account Executive Duties on Public Entity Accounts

Resumes of Team Members

Travis Nixon

Vice President, Claims and Risk Services

Dallas, Texas

Direct: 469-232-2194 Mobile: 972-655-4645

Email: tnixon@mcgriff.com

EDUCATION

University of Texas

LICENSES/CERTIFICATIONS

Property and Casualty Agent

Adjuster – All Lines

AREAS OF EXPERTISE

Public Entities / Governmental Risk Management

Design, marketing and servicing of major commercial accounts

Loss Control and Safety Programs

CLIENT EXPERIENCE

Public Entities

Manufacturing

Transportation

Hotel/Restaurant

Retail

Environmental

CAREER HIGHLIGHTS / ACCOMPLISHMENTS

20+ years of experience in Claims and Risk Management

EXPERIENCE HISTORY

McGriff, Seibels & Williams, Inc. now McGriff Insurance Services, Inc.

Vice President, Claims and Risk Services

2017 – Present

McGriff, Seibels & Williams, Inc.

Senior Account Executive

2007 – 2017

Cambridge Integrated Services, Inc.

Senior Vice President, Claims

2000 – 2007

Gallagher Bassett

Claims Manager/Risk Management Consultant

1995 – 2000

Alexsis, Inc.

Claims Manager/Risk Management Consultant

1991 – 1995

REFERENCES:

New Orleans Aviation Board

Michele Allen-Hart, General Counsel

504-303-7601

Mallen-hart@flymsy.com

City of Houston

Tina Paquet, Assistant Director

832-393-8792

tina.paquet@houstontx.gov

General Professional Services Questionnaire

PROFESSIONAL NO. 13
Name & Title:
Norman Kessel, Assistant Vice President
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Claims Adjustment and Coordination
Years' experience with this Firm:
8 years
Education: Degree(s)/Year/Specialization:
University of Southern California - Bachelor of Science
Other experience and qualifications relevant to the proposed Project:
17 years Claims Experience Designations: Associate in Risk Management (ARM) Associate in Management (AIM)

Resumes of Team Members

Norm Kessel**Assistant Vice President, Claims Account Executive**

Dallas, Texas

Direct: 469-232-2146 / Mobile: 214-235-5619

Email: nkessel@mcgriff.com

EDUCATION

Bachelor of Science, Business Administration – University of Southern California

LICENSES/CERTIFICATIONS

Texas All Lines Insurance Adjuster, ARM, AIM

AREAS OF EXPERTISE

Multi-Lines Claims and Risk Management
Catastrophic Claims and Litigation Management
Employment Practices Liability
Auditing
TPA Management

RMIS Systems
Claims processing & management
Directors & Officers Liability
Texas Tort Claims Act

YEARS OF EXPERIENCE

Since 2007

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.

Assistant Vice President, Claims and Risk Services

2016 – Present

REFERENCES:

New Orleans Aviation Board
Michele Allen-Hart, General Counsel
504-303-7601
Mallen-hart@flymsy.com

City of Houston
Tina Paquet, Assistant Director
832-393-8792
tina.paquet@houstontx.gov

General Professional Services Questionnaire

PROFESSIONAL NO. 14
Name & Title:
Doug Keefer, Vice President
Name of Firm with which associated:
McGriff Insurance Services, LLC
Description of job responsibilities:
Safety and Loss Control
Years' experience with this Firm:
15 years
Education: Degree(s)/Year/Specialization:
Bethel College, BS Baylor University, Masters of Science
Other experience and qualifications relevant to the proposed Project:
Risk & Loss Control Experience for 16+ years. Ergonomic Expertise, OSHA Authorized Clinical Certificate in Functional Capacity Evaluation

Resumes of Team Members

Doug Keefer

Vice President – Risk Control Consultant

Dallas, Texas

Direct: (469) 232-2130 Mobile: (214) 215-8250

Email: dkeefer@mcgriff.com

EDUCATION

B.S. Degree from Bethel College and a Masters of Science Degree from Baylor University

LICENSES/CERTIFICATIONS

Completed certification courses on ergonomic evaluation/job analysis taught by the center for ergonomics at the University of Michigan & Advanced Ergonomics. He has a Clinical Certification in Functional Capacity Evaluation (Blankenship System) from the Blankenship Corporation. He also is OSHA authorized to conduct 10 & 30-hour outreach safety Training for general industry.

AREAS OF EXPERTISE

Safety/Ergonomic projects that include:

Risk/Loss Control Audits

Safety

Fire Protection

Disaster Recovery/Business Continuity

Workers Compensation Program performance audits (Gap Analysis)

Training

Program Development

In-dept analysis

Inspections

Environmental

CLIENT EXPERIENCE

Alltel Corporation

Whole Foods Market

Treasure Island, Inc.

Blockbuster Corporation

Century Golf Partners

Haggar Clothing

USA Compression

Texas Instruments

Ruffin Companies

City of Fort Worth

Port of San Antonio

LSG Sky Chefs Corporation

L&B Realty Advisors

Nokia Corporation

Republic Plastics, Inc.

Hooters Restaurants

Sony-Ericsson-North

Bimbo Bakeries America

G2 Secure Staff Airline Services

Delta Faucet Company

DFW International Airport

Pier 1 Imports, Inc.

Michelin North America

Tarrant County College Dist.

Food Concepts Intl – Abuelos

City of Tampa

EXPERIENCE HISTORY

McGriff Insurance Services, Inc.

2009 – Present

Vice President – Risk Control Consultant

Benchmark Consulting Group, LLC

2005 – 2008

Safety/Ergonomics Specialist

Marsh USA Inc. – Dallas Office

2002 – 2005

Risk Control Consultant

REFERENCES:

New Orleans Aviation Board

Michele Allen-Hart, General Counsel

504-303-7601

Mallen-hart@flymsy.com

City of Houston

Tina Paquet, Assistant Director

832-393-8792

tina.paquet@houstontx.gov

General Professional Services Questionnaire

K. List all prior projects that best illustrate the Firm's qualifications relevant to this Project. Please include any and all work performed for Jefferson Parish. Please attach additional pages if necessary.

PROJECT NO. 1

Project Name, Location and Owner's contact information:	Description of Services Provided:
Broker of Record New Orleans Aviation Board P.O. Box 20007 New Orleans, LA 70141 Contact: Michele Allen-Hart Phone: 504-303-7601 mallen-hart@flymsy.com	Broker of Record Services to Include: Marketing of All Property and Casualty Related Coverages to Carriers including RFP Process Negotiate Cost, Coverage and Terms All Coverages Review Proposals from Carriers for Cost, Coverage and Terms Maintain All Coverages and Daily Service Coordinate Claims Process and Assist with any Coverage Clarification Assist in Contract Analysis White Paper Studies Special Insurance Coverage Projects such as Loss Control Coordination Placement of Builders Risk for Airport Construction Project
Length of Services Provided:	Cost of Services Provided:
2013 - Present	McGriff does not disclose this information

PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
Broker of Record City of New Orleans 1300 Perdido Street, 9E-06 City Hall New Orleans, LA 70112 Contact: Eldridge A Morris, Risk Manager Phone: 504-658-8909 Email: eldrIDGE.morris@nola.gov	Broker of Record Services to Include: Marketing of All Property and Casualty Related Coverages to Carriers including RFP Process Negotiate Cost, Coverage and Terms All Coverages Review Proposals from Carriers for Cost, Coverage and Terms Maintain All Coverages and Daily Service Coordinate Claims Process and Assist with any Coverage Clarification Assist in Contract Analysis and Certificate Review Special Projects as Requested
Length of Services Provided:	Cost of Services Provided:
2014 - Present	McGriff does not disclose this information

General Professional Services Questionnaire

PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Broker of Record St. Tammany Parish Government 21454 Koop Drive, Suite 2G Mandeville, LA 70471 Contact: Andrea L. Kuracka, Risk Manager Phone: 985-898-5226 Email: alkurcka@stp.gov.org	Broker of Record Services to Include: Marketing of All Property and Casualty Related Coverages to Carriers including RFP Process Negotiate Cost, Coverage and Terms All Coverages Review Proposals from Carriers for Cost, Coverage and Terms Maintain All Coverages and Daily Service Coordinate Claims Process and Assist with any Coverage Clarification Assist in Contract Analysis and Certificate Review Special Insurance Coverage Projects such as Loss Control Coordination, Budget Projects, Premium Allocations by Department, Employee Education
Length of Services Provided:	Cost of Services Provided:
2014 to Present	McGriff does not disclose this information

PROJECT NO. 4	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Broker of Record Lafayette Airport Commission 222 Jet Ranger X Drive Lafayette, LA 70508 Contact: Rene' Cotton Phone: 337-266-4403 Email: renec@lftairport.com	Broker of Record Services to Include: Marketing of All Property and Casualty Related Coverages to Carriers including RFP Process Negotiate Cost, Coverage and Terms All Coverages Review Proposals from Carriers for Cost, Coverage and Terms Maintain All Coverages and Daily Service Coordinate Claims Process and Assist with any Coverage Clarification Assist in Contract Analysis and Certificate Review Special Projects including Premium Allocations by Location, Assist with Contractor Insurance Requirements
Length of Services Provided:	Cost of Services Provided:
2016 - Present	McGriff does not disclose this information

General Professional Services Questionnaire

PROJECT NO. 5	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Broker of Record City of Houston 611 Walker, 13th Floor Houston, TX 77002 Contact: Tina Paquet, Risk Manager Phone: 832-393-8792 Email: tina.paquet@houstontx.gov	Marketing, Negotiation and Placement of Property & Casualty Insurance Program Coverage Recommendations Policy Review City Council Presentations Contract Review Special Events Projects Employee Education Vendor Programs RMS Study & Evaluation Building Inspections for Evaluation Purposes Loss Control Claims Reporting & Review Services Daily Activities Special Projects including Procuring Special/Unique Lines of Coverage
Length of Services Provided:	Cost of Services Provided:
2014 - Present	McGriff does not disclose this information

PROJECT NO. 6	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Broker of Record Port of Houston Authority 111 East Loop North Houston, TX 77029 Contact: Norma Essary, Risk Manager Phone: 713-670-2821 Email: nessary@porthouston.com	Broker of Record Services to Include: Marketing of All Property and Casualty Related Coverages to Carriers including RFP Process Negotiate Cost, Coverage and Terms All Coverages Review Proposals from Carriers for Cost, Coverage and Terms Maintain All Coverages and Daily Service Coordinate Claims Process and Assist with any Coverage Clarification Assist in Contract Analysis and Certificate Review RMS Study and Evaluation Special Insurance Coverage Projects including Loss Control Actuarial Review Claims Review OCIP Feasibility and Placement
Length of Services Provided:	Cost of Services Provided:
2009 to Present	McGriff does not disclose this information

General Professional Services Questionnaire

PROJECT NO. 7	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Broker of Record City of Tampa, FL 306 E. Jackson Street, Suite 3E Tampa, FL 33602 Contact: Valerie Horton-Rakes, Risk Manager Phone: 813-274-5747 Email: Valerie.hortonrakes@tampagov.net	Broker of Record Services to Include: Marketing of All Property and Casualty Related Coverages to Carriers including RFP Process Negotiate Cost, Coverage and Terms All Coverages Review Proposals from Carriers for Cost, Coverage and Terms Maintain All Coverages and Daily Service Coordinate Claims Process and Assist with any Coverage Clarification Assist in Contract Analysis and Certificate Review RMS Study and Evaluation Special Insurance Coverage Projects including Loss Control Coordination, Risk Control Survey to access Roof Conditions, Assist with Catastrophic Event Drill Actuarial Review OCIP Feasibility and Placement
Length of Services Provided:	Cost of Services Provided:
2008 to Present	McGriff does not disclose this information

PROJECT NO. 8	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Broker of Record Greater New Orleans Expressway Commission P.O. Box 7656 Metairie, LA 70010 Contact: Melissa Phillpot Phone: 504-835-3118 Email: melissa@gnoc.org	Broker of Record Services to Include: Marketing of All Property and Casualty Related Coverages to Carriers including RFP Process Negotiate Cost, Coverage and Terms All Coverages Review Proposals from Carriers for Cost, Coverage and Terms Maintain All Coverages and Daily Service Coordinate Claims Process and Assist with any Coverage Clarification Assist in Contract Analysis and Certificate Review Attend Board Meetings as Needed Coordinate Loss Control Inspections Budget Projections Special Insurance Coverage Projects
Length of Services Provided:	Cost of Services Provided:
2018 to Present	McGriff does not disclose this information

General Professional Services Questionnaire

PROJECT NO. 9	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Broker of Record Jefferson County, TX 215 Franklin, #202 Beaumont, TX 77701 Contact: Kim Isaacs, Risk Management Phone: 409-839-2391 Email: kisaacs@co.jefferson.tx.us	Broker of Record Services to Include: Marketing of All Property and Casualty Related Coverages to Carriers including RFP Process Negotiate Cost, Coverage and Terms All Coverages Review Proposals from Carriers for Cost, Coverage and Terms Maintain All Coverages and Daily Service Coordinate Claims Process and Assist with any Coverage Clarification Assist in Contract Analysis and Certificate Review Special Projects including Premium Allocations by Locations, Assist with Contractor Insurance Requirements
Length of Services Provided:	Cost of Services Provided:
2003 to Present	McGriff does not disclose this information

PROJECT NO. 10	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Jefferson Parish 200 Derbigny St, #4400 Gretna, LA 70053	Broker of Record Services to include: Marketing of All Property and Casualty Related Coverages to Carriers including RFP Process Negotiate Cost, Coverage and Terms of All Coverages Review Proposals from Carriers for Cost, Coverage and Terms Maintain All Coverages and Daily Service Coordinate Claims Process and Assist with any Coverage Clarification Assist in Contract Analysis and Certificate Review Special Projects as Requested And Per Attached
Length of Services Provided:	Cost of Services Provided:
2012 - 2019	Accepted NFIP Flood policy commissions in lieu of an annual fee

McGriff, Seibels & Williams, Inc. now McGriff Insurance Services, LLC became the Broker of Record for Jefferson Parish Government in 2012. The following are the MIS accomplishments:

- Placed a Master Property policy in 2013 covering 225 buildings, in order to protect the Parish's assets and comply with FEMA's Stafford Act requirements. Hired a third party engineer to help develop the COPE (Construction, Occupancy, Protection and Exposure) information which in turn created a strong position in negotiating terms and conditions.
- Produced and analyzed Hurricane modeling results since 2012.
- Provided rate reductions as follows:
 - 2015-16: 11.84% rate reduction
 - 2016-17: 9.19% rate reduction – added \$5Mil of Surge Coverage and \$10Mil of Earthquake Coverage. Amended the Named Storm Deductible to Hurricane Only Deductible, while maintaining the rate reduction.
 - 2017-18: 12.79% rate reduction
 - 2018-19: mitigated rate increase to only 5.60% after 3 Global CAT events in 2017 (Market Conditions changing)
- Recognized rate reductions on many of the Standalone property placements.
- Covered 17 policies to common expiration dates.
- Insurance coverage placed for Special Districts as needed.
- Restructured the Boiler & Machinery Statement of Values working with Hartford Steam Boiler (carrier) to negate large additional premium for the increase in values.
- Accepted Flood policy commissions in lieu of an annual fee or other compensation.
- On Flood Placements:
 - Moved all Flood expiration dates to common 4/1 renewal date.
 - Advised the Parish to have Elevation Certificates issued on a group of locations that were at the highest rates before the end of the policy term. Parish saved tens of thousands of dollars on the renewal but also received the same returned premium on the in force policies since they completed the studies before the end of the policy term.
 - Tracked FEMA re-map to policy cancellation and rewrite for locations that had map changes.


General Professional Services Questionnaire

L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.

Parties:		Status/Result of Case:
Plaintiff:	Defendant:	
1. NONE		
2.		
3.		
4.		

M. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.

N. To the best of my knowledge, the foregoing is an accurate statement of facts.

Signature:  Print Name: Hank Wolf
 Title: Producer Date: 5/2/2024

3400 Overton Park Dr., Suite 300
Atlanta, Georgia 30339
<http://www.McGriff.com>



Information within this document is confidential & proprietary.
©2023 McGriff Insurance Services, LLC. All rights reserved.
McGriff Insurance Services, LLC is a subsidiary of Truist Insurance Holdings, LLC.