

Shared Agency Services of Alabama, LLC

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SAS

- Shared Agency Services of Alabama, L.L.C. (SASA) is a cooperative venture currently owned by 20 independent insurance agents.
- Shared Agency Services is not an agent Cluster.

SAS

- SAS was started with a unique vision which included improving agency & company market share through hand picked agents across the state of Georgia. (The agents are required to be recommended by owners and or companies, financially stable and not in need of markets. Each new owner is voted upon by the Board of Managers.)
- Each Agency owner is an equal owner in SAS.
- The SAS office was opened in Tucker Georgia with experienced management and staff.

SAS

- SASA was started in 2005 with 16 original owners.
- Currently there are 52 agency owners with 84 locations throughout Georgia and 20 agency owners with 29 locations in Alabama.
- Eight salaried staff members with extensive experience ranging from Senior Insurance Company Executives to Agency CSRs.

SAS

- SAS holds two scheduled meetings per year to promote endorsed insurance companies and brokers. (Additional meetings at the request of partner companies)
 - A meeting in January at St. Simons GA which is attended by both SAS and SASA agency owners; approximately 100 agency staff members; the Georgia Insurance Commissioner; endorsed Company Executives and additional endorsed company personnel.

SAS

- The second annual meeting is the Owner's Planning Conference held in September which is attended by agency principals.
- SASA holds an Alabama only meeting in May for agency members and company representatives.
- The Board of Managers meets quarterly and also holds an annual two day Planning Retreat in November facilitated by an outside professional.

SAS

- SAS expanded into its second state, Alabama in 2006.
- Currently there are 20 agency owners with 29 locations throughout Alabama.
- SAS Alabama is managed by an Alabama owners Board of Managers with over-site and support from the SAS Board of Managers, SAS staff and CEO.
- SAS Alabama holds two scheduled meetings per year.
 - A January meeting held jointly with SAS.
 - A May meeting held in Alabama for the purpose of promoting endorsed insurance companies and brokers.

SAS

- SAS started a young producer program in 2005 to support the owner agencies and promote endorsed companies.
- This group of under 40 year old producers calls themselves the “Yutes”.
- The Yutes formed in 2005 during the Owner’s Planning Conference.
- They have 102 eligible Georgia members and 35 Alabama members.
- The Yutes has a Chairperson and Vice-Chair representing each state.

SAS

- The Yutes meet annually in September and invite endorsed companies to participate.
- Average attendance of 50 Yutes from 45 agencies and 50 company representatives.
- Numerous Yutes also participate in SAS committees.

SAS

- SAS owner/agents write in excess of \$750,000,000 in combined premiums for well over 100,000 personal and commercial clients with the finest companies in the industry. With 84 office locations throughout the state and over 500 licensed agents, their services are available to every community in Georgia.

SAS

- SAS Alabama owner/agents write in excess of \$260,000,000 in combined premiums for well over 35,000 personal and commercial clients with the finest companies in the industry. With 29 office locations throughout the state and over 175 licensed agents, their services are available to throughout Alabama.

SAS

- SAS is an independent entity which provides it's owner agencies with;
 - Company Contracts
 - Company Contract Negotiation
 - Front-Line Company Underwriting
 - Accounting Consolidation
 - Insurance Program Training
 - Single Point dissemination of Company Programs
 - continued

SAS

- Face to face multi-city events to increase partnering Insurance Company program exposure.
- Traveling marketing representative
- A central contact person.
- Extensive agency networking.
- Dispute Resolution

SAS

- SAS is operated by
 - A Board of Managers - 13 agency owners geographically spread throughout the state, that meet quarterly.
 - A CEO, located at the home office in Tucker Ga.
 - A full-time President.
 - A full-time Marketing Manager.
 - Full-time, well trained staff for commercial, personal and specialty programs.

SAS

- SAS has many active Task Force / Committees
 - Technology
 - Marketing
 - Branding / Public Relations
 - Accounting
 - Administrative
 - Governance

SAS

Mission Statement

- To better serve our customers.
- Enhance the strength and position of our successful owner / partners.
- Increase the influence of Shared Agency Services.
- Bring Profitable growth to our Company Affiliates.

By planning for the future, protecting the independence of our owners and creating unique opportunities for our customers and our companies.

SAS

- SAS has developed and continues to develop:
 - Agency Automation to support our owners and companies.
- SAS partners with a technology firm that assists with development and implementation of database management, imaging, remote access and cutting edge automation efficiency solutions.
 - New avenues of information dissemination.
 - Advanced technology to increase efficiencies and support the 500 staff working in homes, offices and remote locations.

SAS

- Benefits SAS brings to Endorsed Companies
 - Immediate dissemination of information to 84 offices in GA and 29 in AL.
 - Face-to-face exposure to owners and producers at SAS events.
 - Additional field assistance from SAS personnel.
 - Centralized contracts and contact from one office.
 - Profit sharing based on state wide experience.
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SAS

- Proven Profitability.
- Increased volume spread without city concentration.
- Decreased work load for companies.
- Improved relationships.
- Established distribution network when entering a new territory.

SAS

- SAS company partnering agreements are designed and negotiated on an individual basis.
- SAS staff has the ability to take an active or a pass-through role in front line underwriting.
- SAS accounting department has the ability to take an active or pass-through role in commissions, over-rides and or profit sharing.

SAS

- SAS Owners benefit with:
 - Access to a wide variety of markets and specialized programs.
 - Outlets to place specialized accounts without volume requirements.
 - A staff to review and submit risks when direct access is not available (depending on the company agreement).
 - Full Commissions.
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SAS

- Asset growth of their company - SAS.
- Quick market search through the SAS Portal.
- Intra-agency communications for sharing information through the Portal.
- Public Access web site for potential customers.
- Technology advice.
- Continuing Education programs through the SAS Portal.
- Support for future perpetuation and agency crisis management.

SAS

- SAS, LLC passes the full commissions paid by insurers to its owners.
- SAS is supported by monthly dues from the owners.
- SAS provides markets and expertise to the small and midsize agency so they can compete with the large national agencies.
- Agencies do not join SAS; SAS hand picks the agencies.
- SAS agency owners are financially stable and do not need company contracts.
- SAS has demonstrated its value added concept to our agencies and our companies for over ten years.

SAS

- Tomorrow's Independent Insurance Agency distribution system - Today.