

THE BISHOP COMPANY, LLC

Making insurance **understandable**

We're focused. The Bishop Company brings intelligent, value-driven commitment to every client relationship. Our focus is exclusively on life insurance; we do not manage money. We are completely independent brokers, which enables us to provide financial predictability by choosing and implementing properly designed products.



Our Resources

Completely independent brokers

- No primary company affiliation (NW Mutual, NY Life, Guardian, etc.)
- Not associated with the M Group, NFP, etc.

Strategic relationships

Forum 400 member — *by invitation only*
Executive Insurance Agency, Inc.

- Master General Agency, est. 1963; 100 member offices nationally
- Preferred insurance company access and leverage
- Advance case design
- Product selection specialist
- Sophisticated medical evaluation department
- Comprehensive back office support

Results

Our clients receive the best and newest products and pricing, and underwriting for difficult medical risks

TYPICAL COMPANIES CONSIDERED:

American General
Life Companies

Lincoln
Financial Group®

NEW
YORK
LIFE

GUARDIAN®

MassMutual
FINANCIAL GROUP®

PennMutual

PACIFIC LIFE

MetLife®

The Prudential®

John Hancock

Principal®
Financial Group

ING

TRANSAMERICA

Mutual
of Omaha®

OVER

The Bishop Company, LLC ■ 100 Cummings Center, Ste. 442P ■ Beverly, MA 01915 ■ 978-927-2008 ■ 888-927-2008 ■ www.thebishopcompanyllc.com

Securities offered through ValMark Securities, Inc. • Member FINRA, SIPC • 130 Springside Drive, Suite 300, Akron Ohio 44333-2431 • 1.800.765.5201 • The Bishop Company LLC is a separate entity from ValMark Securities, Inc.

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Our Promise

Clarity ... to provide information in an understandable format (without insurance jargon) so you can determine which solution best accomplishes your unique planning objectives.

Confidence ... that we have thoroughly researched the marketplace to obtain the best pricing and plan design and that we are completely independent insurance brokers with absolutely NO primary company affiliation.

Capacity ... that we have the knowledge and experience to implement and service the products you have selected and the ability to work with your other professional advisors so there is consistency in all of your plans.



Company Selection Process

- Management interview ... focus ... direction
- Product mix ... Fixed / Variable
- Diversification – Life, Retirement Plans, Group Benefits, Annuities, etc.
- Distribution system ... Career Agent/Independent channel
- Asset/liability matching
- Liquidity
- Internal Rate of Return (IRR) at Life Expectancy



Our Guiding Principles

- Communicate proactively and honestly
- Committed to reliability and accountability
- Compete aggressively in the marketplace
- Do our best every day to achieve excellence in service
- Execute our daily affairs with technical and organizational excellence
- Develop and practice good business and risk management skills
- Grow personally and professionally while supporting growth of others
- Contribute to our profession and society



Our Advantage

- Keep you informed on progress of your cases
- Reputation and experience
- Completely independent brokers
- Due diligence of insurance companies
- Access to nationally recognized experts in estate planning, business succession, executive benefits—at no cost
- Medical evaluation and underwriting capabilities
- Commitment to policy administration

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