

# TRUST, VALUE & EXPERIENCE



One of only forty health insurance agents nationwide to receive the Lifetime Soaring Eagle Award, the industry's highest award for professional knowledge and superior client service.



- **100+ Years of Combined Experience**
- **Advanced Designations for Principals:**
  - Certified Health Care Reform Specialist (CHRS)
  - Registered Health Underwriter (RHU) – American College
  - Registered Employee Benefit Consultant (REBC) – American College
  - Chartered Life Underwriter (CLU) – American College
  - Health Insurance Professional (HIP) – National Association of Health Underwriters
- **Current or past Advisory Council member** for every major insurance carrier including:
  - Aetna – state and national advisory council member
  - Anthem Blue Cross – advisory council member
  - Blue Shield – advisory council member
  - Cigna – advisory council member
  - Cal Choice – advisory council member
  - Covered California – advisory council member
  - Sharp Health Plan – advisory council member
  - Health Net – state advisory council member
  - Kaiser Permanente – advisory council member
  - UnitedHealthcare – advisory council member
- **Fastest 100 Award Winner** Named one of the 100 fastest growing privately held companies in San Diego by the San Diego Business Journal in 2006, 2007, 2008, 2009 and 2010 and, received Honorable Mention in 2011, 2012 and 2013
- **Twice recognized in Inc. Magazine's Annual 5000** as one of America's fastest growing private companies, sharing this recognition with such firms as Intuit, Oracle and Zappos
- **Named one of the top 5 Employee Benefits firms** in San Diego for the past 4 years by the San Diego Business Journal, and one of the top 20 firms for the last 14 years
- **Finalist – Most Admired CEOs** by San Diego Business Journal
- **Fourteenth-time Golden Eagle Award** – National Association of Health Underwriters
- **Lifetime Soaring Eagle Award** – Highest association award from NAHU
- **Leading Producers Round Table (LPRT)** – National Association of Health Underwriters
- **National Employee Benefits Advisory Forum Member (NEBAF)**
- **Member of the key industry organizations** – Employee Benefit Council and San Diego and National Association of Health Underwriters
- **Trusted benefit advisor** for several charitable organizations
- **Professional Service Firms of the Year** – Carlsbad Chamber of Commerce
- **Vice President of Legislation for San Diego** – State and Federal Advocate



EMPLOYEE BENEFITS | HEALTH, LIFE & DISABILITY

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