

## Wrap-up Service/ Provider Information

### FIRM INFORMATION

|  |  |
|--|--|
| <b>Firm Name</b>   | Wrap Up Insurance Solutions  |
| <b>DBE? (Indicate Yes or No and certifications)</b>                          | Y <input type="checkbox"/> N <input checked="" type="checkbox"/>   |
| <b>Contact Name</b>  | Brian Billhartz, CPCU, ARM   |
| <b>Phone</b>   | 636-489-0185   |
| <b>Email address</b>   | bbillhartz@trekadmin.com   |
| <b>Web Address</b>   | www.trekadmin.com  |
| <b>Service Area</b><br><i>(Indicate specific City, State, Region or USA)</i> | National   |
| <b>Narrative Overview of Firm's Wrap-Up Services</b>                         | <p>Wrap Up Insurance Solutions is a full service wrap up administrator and consultant for all types of construction wrap ups, including Owner and Contractor Controlled (OCIP/CCIP) Insurance Programs. Our business niche continues to be in the development of partnerships with other broker/agencies to assist them in the placement and/or administration of these types of programs with their clients. Our team has developed and managed over \$7 billion in construction over 60+ Wrap-up projects.</p> |

### SERVICES OFFERED

| Wrap-up Administration Services          | YES / NO   |
|--|--|
| Commercial projects                      | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |
| Residential projects                     | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |
| Perform feasibility studies              | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |
| Compose RFP answers                      | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |
| In-house administration                  | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |
| Offer on-site administration             | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |
| Provide training and education           | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |
| <b>Comments:</b>                         |  |
| Loss Control & Safety Services           | YES / NO   |
| Commercial                               | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |
| Residential                              | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |
| Employ in-house loss control persons     | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |
| Subcontract to outside vendors           | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |
| <b>Comments:</b>                         |  |
| Claims Administration                    | YES / NO   |
| Employ in-house claims persons           | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |
| Subcontract to outside vendors           | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |
| <b>Comments:</b>                         |  |
| Brokerage Services                       | YES / NO   |
| Placement of commercial wrap-up projects | Y <input checked="" type="checkbox"/> N <input type="checkbox"/> |

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|---|--|
| Placement of residential wrap-up projects                   | Y <input checked="" type="checkbox"/> N <input type="checkbox"/>   |
| <b>Comments:</b>  | We work with our agent/broker partners and share our markets and contacts to develop the optimum program for their client. |
| <b>Insurance Companies/Markets</b>                          | <b>YES / NO</b>  |
| <i>(Please include any limitations in comments section)</i> |  |
| Write commercial wrap-up projects                           | Y <input type="checkbox"/> N <input checked="" type="checkbox"/>   |
| Write residential wrap-up projects                          | Y <input type="checkbox"/> N <input checked="" type="checkbox"/>   |
| <b>Comments:</b>  |  |
| <b>Wrap-Up Software/System Providers</b>                    | <b>YES / NO</b>  |
| Provide wrap-up administration software and/or systems      | Y <input checked="" type="checkbox"/> N <input type="checkbox"/>   |
| System has on-line capabilities                             | Y <input checked="" type="checkbox"/> N <input type="checkbox"/>   |
| Provide programming services                                | Y <input type="checkbox"/> N <input checked="" type="checkbox"/>   |
| <b>Comments:</b>  |  |
| <b>Consultants</b>  | <b>YES / NO</b>  |
| Perform feasibility studies                                 | Y <input checked="" type="checkbox"/> N <input type="checkbox"/>   |
| Represent sponsors only                                     | Y <input type="checkbox"/> N <input checked="" type="checkbox"/>   |
| Create RFP documents  | Y <input checked="" type="checkbox"/> N <input type="checkbox"/>   |
| Compose RFP answers   | Y <input checked="" type="checkbox"/> N <input type="checkbox"/>   |
| Create marketing specifications                             | Y <input checked="" type="checkbox"/> N <input type="checkbox"/>   |
| Assist with program placement                               | Y <input checked="" type="checkbox"/> N <input type="checkbox"/>   |
| Assist with selection of broker/administrator               | Y <input checked="" type="checkbox"/> N <input type="checkbox"/>   |
| Audit and monitoring services                               | Y <input checked="" type="checkbox"/> N <input type="checkbox"/>   |
| Training and education                                      | Y <input checked="" type="checkbox"/> N <input type="checkbox"/>   |
| Expert/witness legal services                               | Y <input type="checkbox"/> N <input checked="" type="checkbox"/>   |
| <b>Comments:</b>  |  |
| <b>Other:</b>   | <b>YES / NO</b>  |
| Medical services/medical trailers                           | Y <input type="checkbox"/> N <input checked="" type="checkbox"/>   |
| Written resources   | Y <input checked="" type="checkbox"/> N <input type="checkbox"/>   |
| Legal services  | Y <input type="checkbox"/> N <input checked="" type="checkbox"/>   |
| Other-Describe  |  |
| <b>Comments:</b>  |  |