

Wrap-up Service/ Provider Information

FIRM INFORMATION

Firm Name	Lockton Companies
DBE? (Indicate Yes or No and certifications)	Y <input type="checkbox"/> N <input checked="" type="checkbox"/>
Contact Name	Colleen Aegerter
Phone	816-960-9980
Email address	caegerter@lockton.com
Web Address	www.lockton.com
Service Area <i>(Indicate specific City, State, Region or USA)</i>	USA
Brief Narrative Overview of Firm's Wrap-Up Services	Market wrap-ups, provide administrative services, for our clients provide loss control service, claims and claims cost control for wrap-ups.

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"/>
Comments:	
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 type="checkbox"/> N <input checked="" type="checkbox"/>
Comments:	
Claims Administration	YES / NO
Employ in-house claims persons	Y <input checked="" type="checkbox"/> N <input type="checkbox"/>
Subcontract to outside vendors	Y <input type="checkbox"/> N <input checked="" type="checkbox"/>
Comments:	
Brokerage Services	YES / NO
Placement of commercial wrap-up projects	Y <input checked="" type="checkbox"/> N <input type="checkbox"/>
Placement of residential wrap-up projects	Y <input checked="" type="checkbox"/> N <input type="checkbox"/>
Comments:	
Insurance Companies/Markets	YES / NO
<i>(Please include any limitations in comments section)</i>	
Write commercial wrap-up projects	Y <input checked="" type="checkbox"/> N <input type="checkbox"/>
Write residential wrap-up projects	Y <input checked="" type="checkbox"/> N <input type="checkbox"/>

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Comments:	
Wrap-Up Software/System Providers	
YES / NO	
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"/>
Comments:	Wrap-up administration software for Lockton use only.
Consultants	
YES / NO	
Perform feasibility studies	Y <input type="checkbox"/> N <input type="checkbox"/>
Represent sponsors only	Y <input type="checkbox"/> N <input type="checkbox"/>
Create RFP documents	Y <input type="checkbox"/> N <input type="checkbox"/>
Compose RFP answers	Y <input type="checkbox"/> N <input type="checkbox"/>
Create marketing specifications	Y <input type="checkbox"/> N <input type="checkbox"/>
Assist with program placement	Y <input type="checkbox"/> N <input type="checkbox"/>
Assist with selection of broker/administrator	Y <input type="checkbox"/> N <input type="checkbox"/>
Audit and monitoring services	Y <input type="checkbox"/> N <input type="checkbox"/>
Training and education	Y <input type="checkbox"/> N <input type="checkbox"/>
Expert/witness legal services	Y <input type="checkbox"/> N <input type="checkbox"/>
Comments:	
Other:	
YES / NO	
Medical services/medical trailers	Y <input type="checkbox"/> N <input type="checkbox"/>
Written resources	Y <input type="checkbox"/> N <input type="checkbox"/>
Legal services	Y <input type="checkbox"/> N <input type="checkbox"/>
Other-Describe	
Comments:	

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