

BRAZORIA COUNTY
PURCHASING DEPARTMENT



SUSAN P. SERRANO, CPPO, CPPB
Purchasing Director

March 26, 2026

McGriff, A Marsh & McLennan Agency LLC Company
Attn: Ben Odom
10100 Katy Freeway, #400
Houston, TX 77043
Ben.odom@marshmma.com

Re: Award for RFP #26-09 Insurance Broker of Brazoria County

Dear Mr. Odom:

Brazoria County is pleased to inform you that on March 24, 2026, Commissioners' Court awarded the above listed project to your company.

The term of this contract shall be effective on April 1, 2026, for a period of one (1) year with an option to renew the contract for up to four (4) additional one-year terms.

A purchase order and /or notice to proceed will follow. Do not proceed with delivery of services or materials prior to receiving a purchase order number from Brazoria Country.

A Certificate of Interested Parties, Form 1295 is required. Vendors are to log onto the Texas Ethics Commission's website https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm and fill out Form 1295. Once the form is completed online, the system will issue a certificate number. Please print, sign the form, and email it to Amanda Erickson at aerickson@brazoriacountytx.gov.

In addition, per Texas Local Government Code 176, completion of the Conflict of Interest Questionnaire, Form CIQ, is required if applicable. You may access the form and further information on our website at <http://brazoriacountytx.gov/departments/purchasing> under the Doing Business section, Conflict of Interest Reporting.

Per Texas Local Government Code Chapters 808, 809, and 2274, completion of the Boycott Verification Form is required, if applicable. You may access the form and further information on our website at <http://brazoriacountytx.gov/departments/purchasing> under the Doing Business section.

Please email the CIQ and Boycott Verification Form to Amanda Erickson at aerickson@brazoriacountytx.gov.

As a reminder, a copy of a current certificate of insurance shall be due to Brazoria County within ten (10) calendar days after receipt of notification of award. The contract shall not become effective until the certificate of insurance is received. Failure to provide said certificate may result in cancellation and/or termination of the contract. Please have the certificate of insurance names Brazoria County as an additional insured and a waiver of subrogation applies in favor of Brazoria County.

Thank you for your interest in Brazoria County. If you have any questions, please do not hesitate to contact me.

Very truly yours,

Natasha Stulberg, CPPB
Brazoria County Assistant Purchasing Director

BRAZORIA COUNTY CONTRACT SHEET

**THE STATE OF TEXAS
COUNTY OF BRAZORIA**

This memorandum of agreement made and entered into on the 24th day of March 2026, by and between Brazoria County in the State of Texas (hereinafter designated County), acting herein by County Judge L.M. "Matt" Sebesta, Jr., by virtue of an order of Brazoria County Commissioners' Court, and McGriff, A Marsh & McLennan Agency LLC Company.

WITNESSETH:

The Vendor and the County agree that the Instructions to Respondents, Specifications/Statement of Work, Standard Terms & Conditions, and all other requirements herein for **RFP #26-09 Insurance Broker of Brazoria County** as stated in the Request for Proposal Table of Contents hereto attached and made a part hereof, together with the bond (when required), vendor's response and negotiated pricing, shall constitute the full agreement and Contract between parties and for furnishing the items set out and described; the County agrees to pay the prices stipulated in the accepted offer.

The order of precedence shall be:

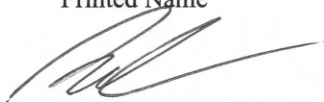
- Brazoria County **RFP #26-09 Insurance Broker of Brazoria County**
- Vendor's submittal to the above listed RFP and the final accepted pricing

It is further agreed that this Contract shall not become binding or effective until signed by the parties hereto and a purchase order authorizing the items desired has been issued.

Executed at Angleton, Texas this 31st day of March 2026.

By: 
County Judge Signature

By: L.M. "Matt" Sebesta, Jr.
Printed Name

By: 
Signature of Vendor

By: Ben Odum, SVP
Printed Name and Title



COMMISSIONERS COURT OF BRAZORIA COUNTY

ORDER NO. I.4.

3/24/2026

Award RFP #26-09 Insurance Broker for Brazoria County

Upon recommendation by the evaluation committee and successful negotiations for a five percent (5%) commission fee and a cap at \$75,000.00, award "RFP #26-09 Insurance Broker for Brazoria County" to the highest ranked vendor, McGriff, A Marsh & McLennan Agency LLC Company of Houston, Texas, who submitted the best evaluated offer meeting our specifications and scope of work.

In addition, such expenditure will be funded by the County's general fund for the Fiscal Year 2026 budget.

Further, that the County Judge is authorized to sign any documents or amendments related to this agreement upon final review by the District Attorney's Office; and that the final documents be authorized to be attached to the Minutes.

RFP #26-09 Award Summary

A total of two hundred and fourteen (214) vendors were notified of our solicitation which was posted on the Bonfire electronic procurement portal, as well as posted on the Electronic Business Daily (ESBD) website and advertised in The Facts. There were forty-eight (48) document takers resulting in four (4) submissions.

Upon recommendation by the evaluation committee and successful negotiations for a five percent (5%) commission fee and a cap at \$75,000.00, award “RFP #26-09 Insurance Broker for Brazoria County” to the highest ranked vendor, McGriff, A Marsh & McLennan Agency LLC Company of Houston, Texas, who submitted the best evaluated offer meeting our specifications and scope of work.

Evaluation Committee:

L.M. “Matt” Sebesta Jr., County Judge

Commissioner Ryan Cade, Commissioner Precinct Two

Kaysie Stewart, County Auditor

Angela Dees, County Treasurer

Ryan Erickson, District Attorney’s Office-Civil Division

Lauren Menia, District Attorney’s Office, (Advisor - Non-voting member)

Natasha Stulberg, Purchasing Department (non-voting member)

Boycott Verification

This verification is required pursuant to Sections 808, 809, 2271, and 2274 (87(R) Senate Bill 13 and 19 versions) of the Texas Government Code:

Definitions:

1. Per Government Code Chapter 808, "Boycott Israel" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made for ordinary business purpose
2. Per Government Code Chapter 809, "Boycott energy company" means, without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company:
 - (A) engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law; or
 - (B) does business with a company described by Paragraph (A).
3. Per Government Code Chapter 2274 (87(R) Senate Bill 19), "Discriminate against a firearm entity or firearm trade association":
 - (A) means, with respect to the entity or association, to:
 - (i) refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association;
 - (ii) refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or
 - (iii) terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association;
4. "Company" has the meaning assigned by Texas Government Code Sections 808.001(2), 809.001(2), and 2274.001(2) (87(R) Senate Bill 19).

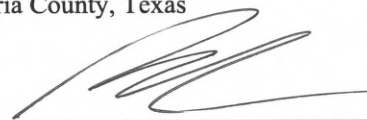
This verification is only required for a contract that is between a governmental entity and a company with 10 or more full-time employees; and has a value of \$100,000 or more that is to be paid wholly or partly from public funds of the governmental entity. If your contract value or number of employees does not reach that threshold, please provide a written certification of the contract amount and number of employees.

I, Ben Odum (Person name), the undersigned representative of (Company or Business Name) McGriff (hereinafter referred to as Company) being an adult over the age of eighteen (18) years of age, do hereby depose and verify under oath that the company named above,

- (A) does not boycott Israel currently;
- (B) will not boycott Israel during the term of the contract the named Company, business or individual with Brazoria County Texas, Texas;
- (C) does not boycott energy companies currently;
- (D) will not boycott energy companies during the term of the contract the named Company, business or individual with Brazoria County, Texas;
- (E) does not discriminate against a firearm entity of firearm trade association currently; and
- (F) will not discriminate against a firearm entity of firearm trade association during the term of the contract the named Company, business or individual with Brazoria County, Texas

3/30/26

DATE



SIGNATURE OF COMPANY REPRESENTATIVE

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

McGriff, A Marsh & McHenry Agency LLC company

2 **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

None

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

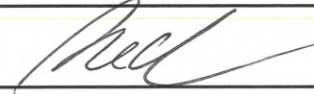
Yes No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

Yes No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7 

Signature of vendor doing business with the governmental entity

3/30/2016

Date

BRAZORIA COUNTY
PURCHASING DEPARTMENT



SUSAN P. SERRANO, CPPO, CPPB
Purchasing Director

March 3, 2026

McGriff, A Marsh & McLennan Agency LLC Company
Attn: Ben Odom
10100 Katy Freeway #400
Houston, TX 77043
Sent Via Email to: ben.odom@marchmma.com

RE: RFP #26-09 Insurance Broker for Brazoria County

Dear Mr. Odom:

This Letter of Intent is made on March 3, 2021 between Brazoria County and your company in order to enter into negotiations for Brazoria County's above referenced contract.

Brazoria County would like to negotiate the suggested commission. The County would propose to retain your suggested 5% commission for our program, but to also include a cap of \$75,000. This commission will also be paid directly by the County, rather than through the insurance providers, in order to maintain compliance with Local Gov't Code 262.036.

In addition, if Brazoria County and your company are unable to reach an agreement, your company will be notified of the intent by Brazoria County to end negotiations.

Please feel free to contact me in the meantime with any questions you may have. We look forward to receiving your proposal no later than Monday, March 9, 2026.

Very truly yours,

A handwritten signature in blue ink, appearing to read "Natasha Stulberg", with a long horizontal flourish extending to the right.

Natasha Stulberg, CPPB
Brazoria County Assistant Purchasing Director

EXHIBIT A – REQUIRED DOCUMENTS

*Note: In order to sign the following documents electronically and insert an authorized signature into the PDF, you will need to use the **latest version of Adobe Reader**. Be aware that such a signature will have the full legal force of a handwritten signature under Texas law. Additionally, all documents with company name and authorized/contact person, and their title with the company, must be identical and match the W-9 with the company's legal name. Documents with different company names may be considered non-responsive.*

- RESPONDENT CERTIFICATION FORM
- BIDDER/RESPONDENT'S AFFIRMATION & SDNs/BLOCKED PERSONS AFFIRMATION
- WORKERS COMPENSATION REQUIREMENTS
- CERTIFICATION REGARDING LOBBYING FORM
- EXCEPTIONS TO STANDARD TERMS & CONDITIONS & SPECIAL REQUIREMENTS *(if applicable)* (If vendor has any exceptions to the RFP terms & conditions or special requirements, they must be included with the RFP submittal in order to be considered)
- NON COLLUSION AFFIDAVIT
- CONFLICT OF INTEREST QUESTIONNAIRE – FORM CIQ *(if applicable)*
- TEXAS GOVERNMENT CODE 552, SUBCHAPTER J ACKNOWLEDGEMENT FORM
- PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES AND EQUIPMENT CERTIFICATION FORM *(Vendor to sign form if applicable to telecommunications)*
- AUTHORIZED NEGOTIATOR
- RESIDENT / NONRESIDENT BIDDER PROVISIONS
- VENDOR DATA SHEET & W-9 FORM

**BRAZORIA COUNTY
RESPONDENT CERTIFICATION FORM**

McGriff, A Marsh & McLennan Agency LLC Company

LEGAL NAME OF CONTRACTING COMPANY

26-3237576

FEDERAL I.D. # (Company or Corporation)

002543023

DUN & BRADSTREET D-U-N-S NUMBER

D: 713-273-2606 M: 713-877-8975

TELEPHONE NUMBER

713-877-8974

FACSIMILE NUMBER

Ben Odom

CONTACT PERSON

Senior Vice President

TITLE

10100 Katy Freeway, #400

COMPLETE MAILING ADDRESS

Houston, Texas

CITY & STATE

77043

ZIP CODE

Same

COMPLETE STREET ADDRESS

Same

CITY & STATE

77043

ZIP CODE

Ben.Odom@MarshMMA.com

EMAIL ADDRESS

CERTIFICATION

By my signature hereon, I certify that the Goods and/or Services that I propose to furnish will meet or exceed every specification contained herein, and that I have read each and every page of the Specifications/Statement of Work, other requirements, as well as, the Standard Terms & Conditions and Bid Table. Further, I agree that if my offer is accepted, I shall perform as required in these Contract documents. I am aware that, once accepted by Brazoria County, my offer becomes a binding Contract in accordance with the provisions herein of the aforementioned Contract documents, and that I will not be permitted to attempt enforcement of any other Contract or Contract provisions.



SIGNATURE

“must be authorized to execute on behalf of company”

November 4, 2025

DATE

Ben Odom

Typewritten or Printed Name

Senior Vice President

Title

**BRAZORIA COUNTY
BIDDER/RESPONDENT'S AFFIRMATION**

This form must be completed, signed, and returned by Bidder/Respondent

NOTE: FAILURE TO SIGN AND RETURN THIS FORM WITHIN 10 DAYS OF AWARD NOTIFICATION MAY RESULT IN THE TERMINATION OF ANY RESULTING PURCHASE ORDER OR CONTRACT.

1. Bidder/Respondent affirms that they are duly authorized to execute this Contract, that this company, corporation, firm, partnership or individual has not prepared this bid/offer in collusion with any other bidder, and that the contents of this bid/offer as to prices, terms or conditions of said bid/offer have not been communicated by the undersigned nor by any employee or Director to any other person engaged in this type of business prior to the official opening of this bid/offer.
2. Bidder/Respondent hereby assigns to purchaser any and all claims for overcharges associated with this Contract which arise under the antitrust laws of the United States, 15 USCA Section 1 et seq., and which arise under the antitrust laws of the State of Texas, Tex. Bus. & Com. Code, Section 15.01, et seq.
3. Pursuant to §262.0276 (a) of the Texas Local Government Code and subject to Brazoria County Court Order No. 36 of October 28, 2003, Bidder/Respondent, hereby affirms that Bidder/Respondent:

(Please check all that are applicable)

Does not own taxable property in Brazoria County.

Does not owe any ad valorem taxes to Brazoria County or is not otherwise indebted to Brazoria County.

BIDDER/RESPONDENT'S SDNs/BLOCKED PERSONS AFFIRMATION

Pursuant to §2155.077 of the Texas Government Code and subject to Brazoria County Court Order No19 of August 9, 2005, Bidder/Respondent, hereby affirms that Bidder/Respondent:

(Please check all that are applicable)

Is not excluded from doing business at the federal level.

Is not listed as Specially Designated Nationals (SDN)s/Blocked Persons (individuals and companies owned or controlled by or acting for or on behalf of targeted Countries; or individuals, groups and entities, such as terrorists and narcotics traffickers designated under programs that are not country-specific).

2. Brazoria County may not make procurement transactions with SDNs/Blocked Persons.

If any additional information is required regarding these requirements, please contact The Brazoria County Purchasing Department PRIOR to execution.

Bidder/Respondent Company Name McGriff, A Marsh & McLennan Agency LLC Company

Signature of Company Official  Date November 4, 2025

Company Official (Printed Name) Ben Odom

Official's Position Senior Vice President

WORKERS' COMPENSATION REQUIREMENTS

(REMOVE IF NOT APPLICABLE TO PROJECT)

BIDDER/RESPONDENT INSTRUCTIONS:

READ THIS ENTIRE DOCUMENT CAREFULLY. FOLLOW ALL INSTRUCTIONS. YOU ARE RESPONSIBLE FOR FULFILLING ALL REQUIREMENTS AND SPECIFICATIONS. BE SURE YOU UNDERSTAND THEM.

The following requirements and specifications supersede all other Requirements where applicable.

Workers' Compensation Insurance Coverage

A. Definitions

Certificate of coverage ("certificate") – A copy of a certificate of insurance, a certificate of authority to self-insure issued by the commission, or a coverage agreement (TWCC-81, TWCC-82, TWCC-83, or TWCC-84), showing statutory workers' compensation insurance coverage for the person's or entity's employees providing services on a project, for the duration of the project.

Duration of the project – includes the time from the beginning of the work on the project until the contractor's/person's work on the project has been completed and accepted by the governmental entity.

Persons providing services on the project ("subcontractor" in §406.096) – includes all persons or entities performing all or part of the services the contractor has undertaken to perform on the project, regardless of whether that person contracted directly with the contractor and regardless of whether that person has employees. This includes, without limitation, independent contractors, subcontractors, leasing companies, motor carriers, owner-operators, employees of any such entity or employees of any entity with furnishes persons to provide services on the project. "Services" include, without limitation, providing, hauling, or delivering equipment or materials, or providing labor, transportation, or other service related to a project. "Services" does not include activities unrelated to the project, such as food/beverage vendors, office supply deliveries, and delivery of portable toilets.

- B.** The contractor shall provide coverage, based on proper reporting of classification codes and payroll amounts and filing of any coverage agreements, which meets the statutory requirements of Texas Labor Code, Section 401.011(44) for all employees of the contractor providing services on the project, for the duration of the project.
- C.** The Contractor must provide a certificate of coverage to the governmental entity prior to being awarded the contract.
- D.** If the coverage period shown on the contractor's current certificate of coverage ends during the duration of the project, the contractor must, prior to the end of the coverage period, file a new certificate of coverage with the governmental entity showing that coverage has been extended.
- E.** The contractor shall obtain from each person providing services on a project, and provide to the governmental entity:
- (1) a certificate of coverage, prior to that person beginning work on the project, so the governmental entity will have on file certificates of coverage showing coverage for all persons providing services on the project; and
 - (2) no later than seven (7) days after receipt by the contractor, a new certificate of coverage showing extension of coverage, if the coverage period shown on the current certificate of coverage ends during the duration of the project.
- F.** The contractor shall retain all required certificates of coverage for the duration of the project and for one year thereafter.
- G.** The contractor shall notify the governmental entity in writing by certified mail or personal delivery, within ten (10) days after the contractor knew or should have known, of any change that materially affects the provision of coverage of any person providing services on the project.
- H.** The contractor shall post on each project site a notice, in the text, form and manner prescribed by the Texas Workers' Compensation Commission, informing all persons providing services on the project that they are required to be covered, and stating how a person may verify coverage and report lack of coverage.
- I.** The contractor shall contractually require each person with whom it contracts to provide services on a project, to:
- (1) provide coverage, base on proper reporting of classification codes and payroll amounts and filing of any coverage agreements, which meets the statutory requirements of Texas Labor Code, Section 401.011(44) for all of its employees providing services on the project, for the duration of the project;
 - (2) provide to the contractor, prior to that person beginning work on the project, a certificate of coverage showing that coverage is being provided for all employees of the person providing services on the project, for the duration of the project;
 - (3) provide the contractor, prior to the end of the coverage period, a new certificate of coverage showing extension of coverage, if the coverage period shown on the current certificate of coverage ends during the duration of the project;
 - (4) obtain from each other person with whom it contracts, and provide to the contractor:

- (a) a certificate of coverage, prior to the other person beginning work on the project; and
- (b) a new certificate of coverage showing extension of coverage, prior to the end of the coverage period, if the coverage period shown on the current certificate of coverage ends during the duration of the project;
- (5) retain all required certificated of coverage on file for the duration of the project and for one (1) year thereafter;
- (6) notify the governmental entity in writing by certified mail or personal delivery, within ten (10) days after the person knew of should have known, of any change that materially affects the provision of coverage of any person providing services on the project; and
- (7) contractually require each person with whom it contracts, to perform as required by paragraphs (9.1) - (9.7), with the certificates of coverage to be provided to the person for whom they are providing services.

J. By signing this contract or providing or causing to be provided a certificate of coverage, the contractor is representing to the governmental entity that all employees of the contractor who will provide services on the project will be covered by workers' compensation coverage for the duration of the project, that the coverage will be based on proper reporting of classification codes and payroll amounts, and that all coverage agreements will be filed with the appropriate insurance carrier of, or in the case of a self-insured, with the commission's Division of Self-Insurance Regulation. Providing false or misleading information may subject the contractor to administration penalties, criminal penalties, civil penalties, or other civil actions.

K. The contractor's failure to comply with any of these provision is a breach of contract by the contractor which entitles the governmental entity to declare the contract void if the contractor does not remedy the breach within ten (10) days after receipt of notice of breach from the governmental entity.

If awarded a contract for RFP #25-80, by my signature below, I certify that I will provide workers' compensation insurance coverage for each employee employed on this project. I also certify that each of my subcontractors will also provide workers compensation for each employee employed on this project.



SIGNATURE

Ben Odom

Typewritten or Printed Name

November 4, 2025

DATE

Senior Vice President

Title

CERTIFICATION REGARDING LOBBYING

Certifications For Contracts, Grants, Loans, And Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

- (1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
- (2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL "Disclosure Form to Report Lobbying," in accordance with its instructions.
- (3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed within this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.



Signature/Authorized Certifying Official

Ben Odom

Typed Name and Title

McGriff, A Marsh & McLennan Agency LLC Company

Applicant / Organization

November 4, 2025

Date Signed

INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action, or a material change to a previous filing, pursuant to title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.


1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered Federal action.
3. Identify the appropriate classification of this report. If this is a follow-up report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.
4. Enter the full name, address, city, State and zip code of the reporting entity. Include Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or subaward recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants and contract awards under grants.
5. If the organization filing the report in item 4 checks "Subawardee," then enter the full name, address, city, State and zip code of the prime Federal recipient. Include Congressional District, if known.
6. Enter the name of the federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.
7. Enter the Federal program name or description for the covered Federal action (item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.
8. Enter the most appropriate Federal identifying number available for the Federal action identified in item 1 (e.g., Request for Proposal (RFP) number; Invitations for Bid (IFB) number; grant announcement number; the contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Included prefixes, e.g., "RFP-DE-90-001."
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in item 4 or 5.
10. (a) Enter the full name, address, city, State and zip code of the lobbying registrant under the Lobbying Disclosure Act of 1995 engaged by the reporting entity identified in item 4 to influence the covered Federal action.
(b) Enter the full names of the individual(s) performing services, and include full address if different from 10(a). Enter Last Name, First Name, and Middle Initial (MI).
11. The certifying official shall sign and date the form, print his/her name, title, and telephone number.

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB control Number. The valid OMB control number for this information collection is OMB No. 0348-0046. Public reporting burden for this collection of information is estimated to average 10 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046), Washington, DC 20503

0348-0046

Disclosure of Lobbying Activities

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352
(See reverse for public burden disclosure)

Type of Federal Action: _____ a. contract _____ b. grant _____ c. cooperative agreement _____ d. loan _____ e. loan guarantee _____ f. loan insurance	Status of Federal Action: _____ a. bid/offer/application _____ b. initial award _____ c. post-award <u>No lobbying activities to report</u>	Report Type: _____ a. initial filing _____ b. material change
Name and Address of Reporting Entity: _____ Prime _____ Subawardee Tier _____, if Known: Congressional District, if known:	If Reporting Entity in No. 4 is Subawardee, Enter Name and Address of Prime: Congressional District, if known:	
Federal Department/Agency:	7. Federal Program Name/Description: CFDA Number, if applicable: _____	
Federal Action Number, if known:	9. Award Amount, if known: \$	
10. a. Name and Address of Lobbying Registrant (if individual, last name, first name, MI):	b. Individuals Performing Services (including address if different from No. 10a) (last name, first name, MI):	
11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.	Signature:  Print Name: Ben Odom Title: Senior Vice President Telephone No.: 713-273-2606 Date: November 4, 2025	
Federal Use Only	Authorized for Local Reproduction Standard Form - LLL (Rev. 7-97)	

Note: If this form is not applicable to your company, please mark the form N/A and sign the highlighted signature field above.

**VENDOR TO INSERT EXCEPTIONS TO
STANDARD TERMS & CONDITIONS & SPECIAL
REQUIREMENTS HERE (IF APPLICABLE)**

 X Company **does not** have exceptions *(If applicable, check here)*

Or

 Company **does have** exceptions *(If applicable, check here and list exceptions here for consideration. Brazoria County will review all exceptions listed and will formally communicate as to if any exceptions are accepted by the County. If exceptions are accepted by the County, they will be added in the form of an addendum.)*

**NON-COLLUSION
AFFIDAVIT**

THE STATE OF TEXAS

OWNER Brazoria County

Before me, the undersigned authority, on this day personally appeared Ben Odom

who being by me duly sworn upon oath says: that he is duly qualified and authorized to make this affidavit for and on behalf of McGriff, A Marsh & McLennan Agency LLC Company ("Contractor"), of and is fully cognizant of the fact herein set out: that Contractor has not, either directly or indirectly, entered into any agreement with OWNER in any collusion: or otherwise taken any action in restraint of free competitive bidding in connection with the contract for the above referenced project.



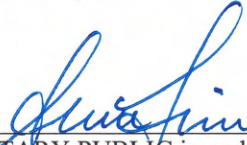
Ben Odom

Senior Vice President

Name

Title

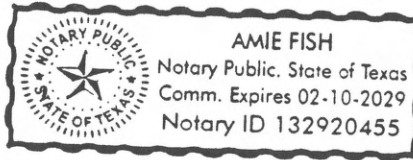
SWORN TO AND SUBSCRIBED BEFORE ME by the said Ben Odom, this 17 day of November, 20 25, to certify which witness my hand and seal of office.


NOTARY PUBLIC in and for

State of Texas

Printed Name: Amie Fish

My Commission Expires: 02/10/2029



CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

FORM CIQ

<p>This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.</p> <p>This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).</p> <p>By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.</p> <p>A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.</p>	<p>OFFICE USE ONLY</p> <p>Date Received</p>
<p>1 Name of vendor who has a business relationship with local governmental entity.</p> <p style="text-align: center; font-size: 1.2em;">McGriff, A Marsh & McLennan Agency LLC Company</p>	
<p>2 <input type="checkbox"/> Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)</p>	
<p>3 Name of local government officer about whom the information is being disclosed.</p> <p style="text-align: center; font-size: 1.2em;">None</p> <p style="text-align: center; font-size: 0.8em;">Name of Officer</p>	
<p>4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.</p> <p style="margin-top: 20px;">A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?</p> <p style="margin-left: 100px;"> <input type="checkbox"/> Yes <input type="checkbox"/> No </p> <p style="margin-top: 10px;">B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?</p> <p style="margin-left: 100px;"> <input type="checkbox"/> Yes <input type="checkbox"/> No </p>	
<p>5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.</p>	
<p>6 <input type="checkbox"/> Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).</p>	
<p>7</p> <div style="display: flex; justify-content: space-between; align-items: flex-end;"> <div style="width: 45%; text-align: center;"> <p style="font-size: 0.8em;">Signature of vendor doing business with the governmental entity</p> </div> <div style="width: 45%; text-align: center;"> <p style="font-size: 1.2em; margin: 0;">November 4, 2025</p> <p style="font-size: 0.8em; margin: 0;">Date</p> </div> </div>	

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed;

or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

(i) a contract between the local governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

(a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

(1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

(2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.

TEXAS GOVERNMENT CODE 552, SUBCHAPTER J ACKNOWLEDGEMENT FORM

**Respondent acknowledges having read and understood the following law,
effective January 1, 2020**



November 4, 2025

SIGNATURE

DATE

“must be authorized to execute on behalf of company”

Ben Odom

Senior Vice President

Typewritten or Printed Name

Title

SUBCHAPTER J. ADDITIONAL PROVISIONS RELATED TO CONTRACTING INFORMATION

Sec. 552.371. CERTAIN ENTITIES REQUIRED TO PROVIDE CONTRACTING INFORMATION TO GOVERNMENTAL BODY IN CONNECTION WITH REQUEST. (a) This section applies to an entity that is not a governmental body that executes a contract with a governmental body that:

(1) has a stated expenditure of at least \$1 million in public funds for the purchase of goods or services by the governmental body; or

(2) results in the expenditure of at least \$1 million in public funds for the purchase of goods or services by the governmental body in a fiscal year of the governmental body.

(b) This section applies to a written request for public information received by a governmental body that is a party to a contract described by Subsection (a) for contracting information related to the contract that is in the custody or possession of the entity and not maintained by the governmental body.

(c) A governmental body that receives a written request for information described by Subsection (b) shall request that the entity provide the information to the governmental body. The governmental body must send the request in writing to the entity not later than the third business day after the date the governmental body receives the written request described by Subsection (b).

(d) Notwithstanding Section [552.301](#):

(1) a request for an attorney general's decision under Section [552.301](#)(b) to determine whether contracting information subject to a written request described by Subsection (b) falls within an exception to disclosure under this chapter is considered timely if made not later than the 13th business day after the date the governmental body receives the written request described by Subsection (b);

(2) the statement and copy described by Section [552.301](#)(d) is considered timely if provided to the requestor not later than the 13th business day after the date the governmental body receives the written request described by Subsection (b);

(3) a submission described by Section [552.301](#)(e) is considered timely if submitted to the attorney general not later than the 18th business day after the date the governmental body receives the written request described by Subsection (b); and

(4) a copy described by Section [552.301](#)(e-1) is considered timely if sent to the requestor not later than the 18th business day after the date the governmental body receives the written request described by Subsection (b).

(e) Section [552.302](#) does not apply to information described by Subsection (b) if the governmental body:

(1) complies with the requirements of Subsection (c) in a good faith effort to obtain the information from the contracting entity;

(2) is unable to meet a deadline described by Subsection (d) because the contracting entity failed to provide the information to the governmental body not later than the 13th business day after the date the governmental body received the written request for the information; and

(3) if applicable and notwithstanding the deadlines prescribed by Sections [552.301](#)(b), (d), (e), and (e-1), complies with the requirements of those subsections not later than the eighth business day after the date the governmental body receives the information from the contracting entity.

(f) Nothing in this section affects the deadlines or duties of a governmental body under Section [552.301](#) regarding information the governmental body maintains, including contracting information.

Sec. 552.372. BIDS AND CONTRACTS. (a) A contract described by Section [552.371](#) must require a contracting entity to:

(1) preserve all contracting information related to the contract as provided by the records retention requirements applicable to the governmental body for the duration of the contract;

(2) promptly provide to the governmental body any contracting information related to the contract that is in the custody or possession of the entity on request of the governmental body; and

(3) on completion of the contract, either:

(A) provide at no cost to the governmental body all contracting information related to the contract that is in the custody or possession of the entity; or

(B) preserve the contracting information related to the contract as provided by the records retention requirements applicable to the governmental body.

(b) Unless Section [552.374](#)(c) applies, a bid for a contract described by Section [552.371](#) and the contract must include the following statement: "The requirements of Subchapter J, Chapter [552](#), Government Code, may apply to this (include "bid" or "contract" as applicable) and the contractor or vendor agrees that the contract can be terminated if the contractor or vendor knowingly or intentionally fails to comply with a requirement of that subchapter."

(c) A governmental body may not accept a bid for a contract described by Section [552.371](#) or award the contract to an entity that the governmental body has determined has knowingly or intentionally failed to comply with this subchapter in a previous bid or contract described by that section unless the governmental body determines and documents that the entity has taken adequate steps to ensure future compliance with the requirements of this subchapter.

Sec. 552.373. NONCOMPLIANCE WITH PROVISION OF SUBCHAPTER. A governmental body that is the party to a contract described by Section [552.371](#) shall provide notice to the entity that is a party to the contract if the entity fails to comply with a requirement of this subchapter applicable to the entity. The notice must:

(1) be in writing;

(2) state the requirement of this subchapter that the entity has violated; and

(3) unless Section [552.374](#)(c) applies, advise the entity that the governmental body may terminate the contract without further obligation to the entity if the entity does not cure the violation on or before the 10th business day after the date the governmental body provides the notice.

Sec. 552.374. TERMINATION OF CONTRACT FOR NONCOMPLIANCE. (a) Subject to Subsection (c), a governmental body may terminate a contract described by Section [552.371](#) if:

(1) the governmental body provides notice under Section [552.373](#) to the entity that is party to the contract;

(2) the contracting entity does not cure the violation in the period prescribed by Section [552.373](#);

(3) the governmental body determines that the contracting entity has intentionally or knowingly failed to comply with a requirement of this subchapter; and

(4) the governmental body determines that the entity has not taken adequate steps to ensure future compliance with the requirements of this subchapter.

(b) For the purpose of Subsection (a), an entity has taken adequate steps to ensure future compliance with this subchapter if:

(1) the entity produces contracting information requested by the governmental body that is in the custody or possession of the entity not later than the 10th business day after the date the governmental body makes the request; and

(2) the entity establishes a records management program to enable the entity to comply with this subchapter.

(c) A governmental body may not terminate a contract under this section if the contract is related to the purchase or underwriting of a public security, the contract is or may be used as collateral on a loan, or the contract's proceeds are used to pay debt service of a public security or loan.

Sec. 552.375. OTHER CONTRACT PROVISIONS. Nothing in this subchapter prevents a governmental body from including and enforcing more stringent requirements in a contract to increase accountability or transparency.

Sec. 552.376. CAUSE OF ACTION NOT CREATED. This subchapter does not create a cause of action to contest a bid for or the award of a contract with a governmental body.

Added by Acts 2019, 86th Leg., R.S., Ch. 1216 (S.B. [943](#)), Sec. 9, eff. January 1, 2020.

PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES AND EQUIPMENT CERTIFICATION FORM

(Vendor to sign form if applicable to telecommunications)

The undersigned vendor hereby represents and warrants that the equipment, systems, and/or services which it will provide to Brazoria County do not use covered telecommunications equipment or services (as defined in Section 889 John S. McCain National Defense Authorization Act for Fiscal Year 2019 (FY 2019 NDAA), Pub. L. No. 115-232 (2018)) as a substantial or essential component of any system, or as critical technology of any system.

Additionally, the undersigned vendor hereby represents and warrants that the equipment, systems, and/or services it will provide are not prohibited from being procured using grant funds under section 889 of the FY 2019 NDAA.

Further, per 2 CFR 200.216 (b) & (c)

(b) As described in section 889 of [Public Law 115-232](#), “covered telecommunications equipment or services” means any of the following:

- (1) Telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities);
- (2) For the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities);
- (3) Telecommunications or video surveillance services provided by such entities or using such equipment;
- (4) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of the National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country;

(c) For the purposes of this section, “covered telecommunications equipment or services” also include systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system.

McGriff

COMPANY NAME

Ben Odom

SIGNATURE OF COMPANY REPRESENTATIVE

Ben Odom

PRINTED NAME

Senior Vice President

TITLE

11/24/2025

DATE

PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES AND EQUIPMENT CERTIFICATION FORM

(Vendor to sign form if applicable to telecommunications)

The undersigned vendor hereby represents and warrants that the equipment, systems, and/or services which it will provide to Brazoria County do not use covered telecommunications equipment or services (as defined in Section 889 John S. McCain National Defense Authorization Act for Fiscal Year 2019 (FY 2019 NDAA), Pub. L. No. 115-232 (2018)) as a substantial or essential component of any system, or as critical technology of any system.

Additionally, the undersigned vendor hereby represents and warrants that the equipment, systems, and/or services it will provide are not prohibited from being procured using grant funds under section 889 of the FY 2019 NDAA.

Further, per 2 CFR 200.216 (b) & (c)

(b) As described in section 889 of [Public Law 115-232](#), “covered telecommunications equipment or services” means any of the following:

- (1) Telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities);
- (2) For the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities);
- (3) Telecommunications or video surveillance services provided by such entities or using such equipment;
- (4) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of the National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country;

(c) For the purposes of this section, “covered telecommunications equipment or services” also include systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system.

COMPANY NAME

SIGNATURE OF COMPANY REPRESENTATIVE

PRINTED NAME

TITLE

DATE

AUTHORIZED NEGOTIATOR

If your company is selected to enter into negotiations with the County, please list the name and contact information for the individual or individuals that will be negotiating a possible contract on behalf of your company.

Name: Ben Odom

Title: Senior Vice President

Email Address: Ben.Odom@MarshMMA.com

Phone Number: P: 713-273-2606 | C: 281-636-0591

Name: Joe Blasi

Title: Senior Executive Vice President

Email Address: Joe.Blasi@MarshMMA.com

Phone Number: 713-213-9934

RESIDENT / NONRESIDENT BIDDER PROVISIONS

Chapter 2252, Subchapter A, of the Texas Government Code establishes certain requirements applicable to proposers who are not Texas residents. Under the statute, a “resident” proposer is a person whose principle place of business is in Texas, including a contractor whose ultimate parent company or majority owner has its principle place of business in Texas.

A “nonresident” proposer is a person who is not a Texas resident. Please indicate the status of your company as a “resident” proposer or a “nonresident” proposer under these definitions.

Please check (✓) one of the following:

- I certify that my company is a **Resident Proposer**.
- I certify that my company is a **Nonresident Proposer**.

If your company is a Nonresident Proposer, you must provide the following information for your resident state (the state in which your company’s principle place of business is located):

McGriff, A Marsh & McLennan Agency LLC Company

Company Name

10100 Katy Freeway, Suite 400

Address

Houston

City

Texas

State

77043

Zip Code

- A. Does your resident state require a proposer whose principle place of business is in Texas to under-price proposers whose resident state is the same as yours by a prescribed amount or percentage to receive a comparable contract?

Yes No

- B. What is the prescribed amount of percentage? \$ _____ or _____ %

Request for Taxpayer Identification Number and Certification

Go to www.irs.gov/FormW9 for instructions and the latest information.

**Give form to the
requester. Do not
send to the IRS.**

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See <i>Specific Instructions</i> on page 3.	<p>1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)</p> <p>Marsh & McLennan Companies, Inc.</p>	
	<p>2 Business name/disregarded entity name, if different from above.</p> <p>McGriff, a Marsh & McLennan Agency LLC Company (26-3237576)</p>	
	<p>3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.</p> <p><input type="checkbox"/> Individual/sole proprietor <input checked="" type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate</p> <p><input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____</p> <p>Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.</p> <p><input type="checkbox"/> Other (see instructions) _____</p>	<p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) <u>5</u></p> <p>Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) <u>E</u></p> <p><i>(Applies to accounts maintained outside the United States.)</i></p>
	<p>3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions _____ <input type="checkbox"/></p>	
	<p>5 Address (number, street, and apt. or suite no.). See instructions.</p> <p>550 South Caldwell Street</p>	<p>Requester's name and address (optional)</p>
	<p>6 City, state, and ZIP code</p> <p>Charlotte, NC 28202</p>	
	<p>7 List account number(s) here (optional)</p>	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number										
or										
Employer identification number										
3	6	-	2	6	6	8	2	7	2	

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person

Date **12/06/2024**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, Withholding of Tax on Nonresident Aliens and Foreign Entities).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the instructions for Part II for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships*, earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5 ²
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

¹ See Form 1099-MISC, Miscellaneous Income, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/Businesses and clicking on Employer Identification Number (EIN) under Starting a Business. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLÉ accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor [*]
For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee

For this type of account:	Give name and EIN of:
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(f)(E))	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships*, earlier.

***Note:** The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

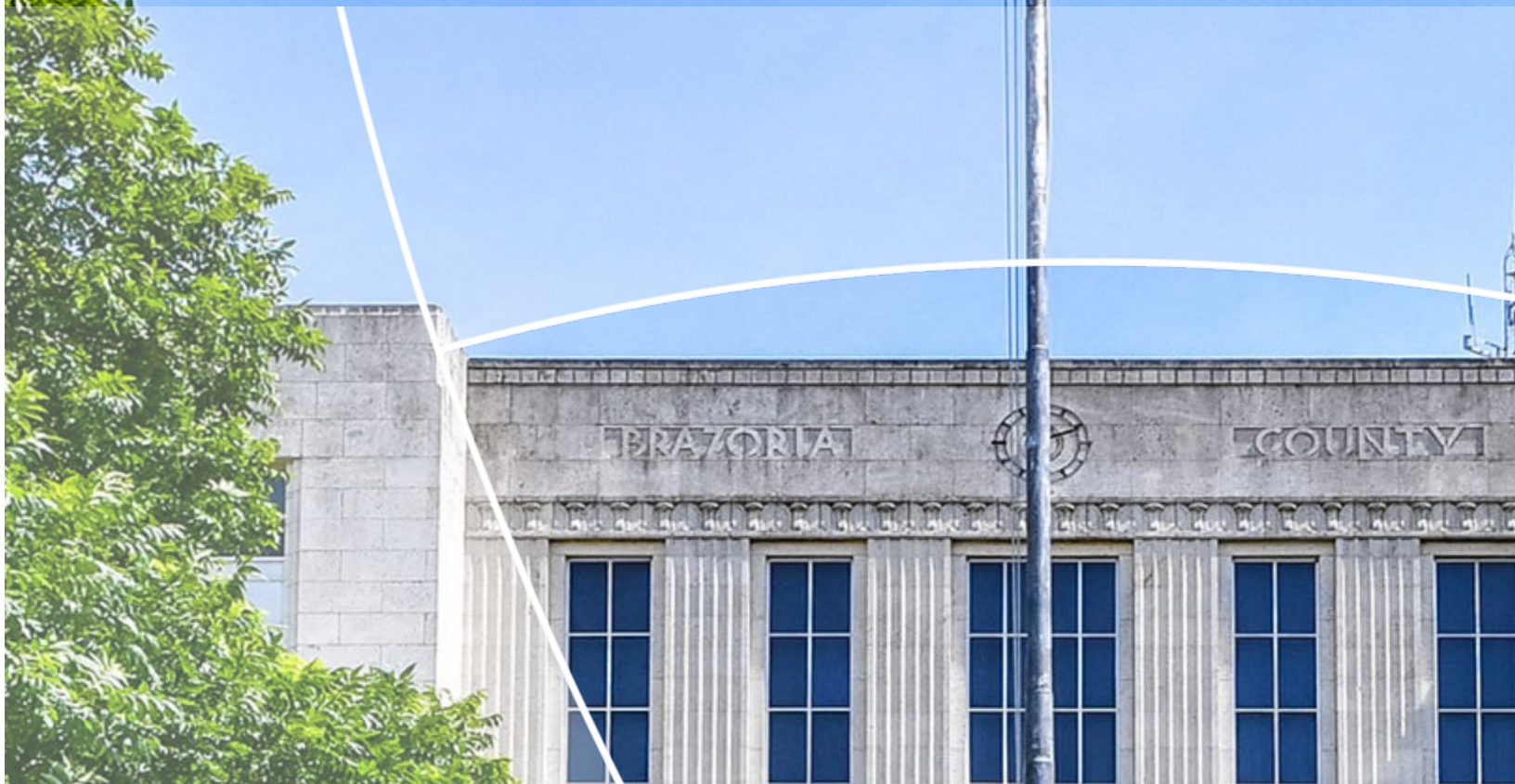
The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Visit www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.



Proposal for

RFP #26-09 Insurance Brokerage Service

November 19, 2025



Table of Contents

	Page
Executive Summary	3
Tab 1 Qualifications of the Brokerage Firm.....	4
Tab 2 Brokerage Team	24
Tab 3 Innovation and Effectiveness	28
Tab 4 Commission Percentage	32
Exceptions to Standard Terms and Conditions	33
Addendums	34
Litigation, Claims, Reputation and Compliance Form	36
Appendices	37
Appendix A – Sample Analytics	38
Appendix B – Resumes	42

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Executive Summary

This section should be limited to a brief narrative highlighting the company's background and experience. Narrative should clearly demonstrate compliance with respondent qualifications listed in the RFP specifications. Include length of time the company has been in business and provide examples of past and current projects. Note that the executive summary is to identify the primary contacts for the Respondent.

McGriff and Hagan Risk Partners (McGriff/Hagan) are pleased to have the opportunity to participate in the Brazoria County Broker Services RFP. Our intent throughout this proposal is to provide an accessible format that addresses the specific items within the RFP specifications and to further support that McGriff/Hagan have the necessary people, experience, resources, talent, and capabilities to add considerable value in the placement and service of Brazoria County's Insurance Program.

With more than a century of experience, McGriff provides consultative insurance and risk management solutions for Property and Casualty, Surety, Cyber, Executive Risk, Flood Insurance, Workers Compensation, and Employee Benefits coverage with a focus on serving the needs of Texas Public Entities.

We believe we are uniquely qualified to provide the best overall value to Brazoria County for the following reasons:

Texas Public Entity Experience: McGriff provides insurance and risk management services for more Texas Public Entities than any of our peers. We currently serve nine of the state's thirteen most populous counties. No other firm can match our extensive experience and expertise in large Texas counties.

Past and Current Projects: Some of the large organizations we serve are Harris County, Fort Bend County, Williamson County, Jefferson County, Travis County, Bexar County, Liberty County, City of Houston, City of Dallas, City of Pasadena, City of Sugar Land, and several large Texas Public Entity organizations.

Marketing Leverage: McGriff is a wholly owned subsidiary of Marsh, the largest brokerage firm in the World, and McGriff is the largest Texas Public Entity risk management/insurance firm in the State. Our Houston offices place more Public Entity premiums in the marketplace than any of our competitors, by more than seven times, which yields significant market leverage with key underwriters. We will utilize our market leverage to secure the most competitive terms for Brazoria County.

Local Resources: Brazoria County will be serviced out of our Houston office and Angleton via Hagan Risk Partners, which comprises over 250 insurance professionals. All broking, claim management, and day-to-day services will be based in our local offices. Our team is always available to provide an immediate response. We also maintain a fully staffed claims management, loss prevention, and risk analytics team in our Houston office that will bring considerable value to Brazoria County.

No Learning Curve: With extensive experience serving more Texas counties than any other firm, combined with our expertise and local presence, we understand your risk factors, operations, and how to design an insurance program tailored to your specific needs.

McGriff/Hagan is well-suited to implementing the work within the project schedule. Ben Odom, Cory Hagan and Wes Folse will be the main points of contact for Brazoria County and have the authority to execute/bind this proposal/contract with Brazoria County.

Sincerely,

Ben Odom, Wes Folse & Cory Hagan

McGriff & Hagan Risk Partners

Tab 1 Qualifications of the Brokerage Firm

Describe the brokerage firm's qualifications and resources available to provide the services listed above. Such description shall include, but not be limited to, responses to the following:

1. Identify the length of time the brokerage firm has been operating and has operated within the Texas Public Sector Community.

McGriff/MMA has been operating as a brokerage firm for over 100 years, having been founded in 1922, with its name dating back to 1886. The firm has operated within the Texas Public Sector Community for more than 40 years. Our Public Entity practice is our strongest practice group within our organization, serving over 350 unique Texas public entities across our risk and benefit platforms.

2. Identify the brokerage firm's location, size, and presence, including:

a. The address of the brokerage firm's office that will handle the County's account.

All work performed on behalf of Brazoria County will be out of our Houston office, located at 10100 Katy Freeway, Suite 400, Houston, Texas 77043 and within the local Hagan Risk Partners office, located at 2700 TX-35, Angleton, TX 77515.

b. The size of the staff at such office.

The McGriff Houston office has approximately 250 employees consisting of client representatives, brokers, account service representatives, loss control professionals, licensed adjusters, and analytics professionals. Our local Houston office has over 50 professionals who focus on serving our Texas Public Entity clients. On a national scale, our firm has over 15,000 employees. Hagan Risk Partners has approximately 25 employees consisting of client representatives, brokers, account service representatives and loss control professionals available to serve Brazoria County.

c. Number of clients that the brokerage firm presently serves.

McGriff is the leading provider of Risk Management and Insurance Services for Texas Public Entities, serving more than 350 Texas Entities. We currently serve 9 of the 13 most populous counties in the State, as well as the City of Houston, City of Freeport, City of Pearland, Brazosport College, Sweeny ISD, CBISD, and Angleton ISD within the County. Region is a leader in the Texas County marketplace, servicing more counties than any other brokerage firm. We have approximately 100,000+ Property and Casualty clients.

a. The premium volume the brokerage firm produces annually and how much of that premium volume is from public entities.

McGriff/MMA/Hagan places over \$250 billion in annual premiums into the insurance marketplace, with over \$10 billion into the Public Entity Insurance marketplace. There is no other firm that can match our premium volumes globally or within the Texas Public Entity marketplace.

3. Describe any experience and special expertise your brokerage firm has in providing the desired insurance coverages and risk management consultation services to local governmental entities, especially those in Texas.

McGriff/Hagan's Texas experience and expertise in serving Texas Public Entities is unmatched by any other broker provider. McGriff provides Risk Management/Insurance services to more Texas Counties than any other brokerage firm, serving 7 of the 10 most populous counties and 9 of the 13 most populous counties in the State. BSome of the local entities we have experience with are: Harris County, Fort Bend County, Liberty County, Jefferson County, San Patricio County, Travis County, Bexar County, Williamson County, Atascosa County, Jasper County, Angelina County, Cameron County, Dallas County, City of Houston, City of Pasadena, City of Freeport, Sweeny ISD, Columbia Brazoria ISD, Angleton ISD, Brazosport College and several more local Public Entities. Below is a small sample of the governmental entities we currently service:

National & Local Public Entity Experience

Bexar County · Brooks Development Authority · Brownsville Public Utilities · City of Arlington · City of Bryan · City of College Station · City of Dallas · City of Denton · City of Garland · City of Grand Prairie · City of Greenville · City of Houston · City of Irving · City of Lewisville · City of McKinney · City of McAllen · City of Miami Beach · City of New Orleans · City of North Richland Hills · City of Tampa · Collin County · Dallas County · Dallas County Community College District · Denton County Transportation Authority · Denton Energy Center · Ector County Independent School District · El Paso County · Garland Independent School District · Greater New Orleans Expressway Authority · Harlandale Independent School District · Harris County · Hidalgo County · Jefferson County · Lafayette Airport · Leon County School Board · Mesquite Independent School District · New Orleans Aviation Board · Non-Flood Asset Protection Management Authority · North East Independent School District · Northside Education Foundation · Northside Independent School District · Plano Independent School District · Port of Houston Authority · Port of San Antonio · Richardson Independent School District · San Antonio Independent School District · St. Tammany Parish Government · San Antonio Housing Authority · San Antonio Early Childhood MDC · San Patricio County · Somerset Independent School District · Southwest Preparatory School · Tarrant County College District · Tarrant County · Terrebonne Parish · Texas Municipal Power Agency · Texas Political Subdivisions · Texas State Aquarium Association · Via Metropolitan Transit Authority

KEY INSURANCE COVERAGES FOR BRAZORIA COUNTY

- **Property**
- **Liability**
- **Builders Risk**
- **Professional Liability**
- **Auto/Fleet**
- **Crime**
- **Boiler & Machinery**
- **Wind/Flood**
- **Cyber**
- **Workers' Compensation**
- **Pollution**
- **Aviation**

RFP #26-09 Insurance Brokerage Services for Brazoria County

Brazoria County's service team will be led by Ben Odom, Cory Hagan, Joe Blasi and Wes Folse.

Ben received his BBA in Risk Management & Insurance and started his career as an underwriter for Travelers Insurance in its Public Entity Division. Ben's underwriting experience has proven to be valuable time and time again for his clients, as he understands the underwriting process, account rating, and how to navigate the internal waters of an insurance carrier to achieve target pricing or expedite a claim payment and has several strong relationships with former co-workers at the major Texas Public Entity carriers. Some notable clients consist of: Travis County, Williamson County, Liberty County, Smith County, Harris County, Jasper County, Angelina County, Atascosa County, Dallas County, Collin County & San Patricio County.

Cory is the President and founder of Hagan Risk Partners. He originally established his agency in 2016 and has quickly become the largest Property & Casualty insurance agency in Lower Brazoria County. His leadership, local knowledge, and commitment to service have positioned Hagan Risk Partners as a trusted advisor to Public Entities and businesses throughout the region. Cory is a proud Brazoria County native and remains deeply committed to the community he serves. He actively supports and partners with several local charitable organizations, including BACH (Brazoria County Association for Citizens with Handicaps), True to Life Ministries, Southern Outdoor Dreams, and Brazoria County Head Start.

Joe has been providing Risk Management & Brokerage services to local Public Entities for over 28 years. Joe holds his Chartered Property Casualty Underwriter designation and Associate in Risk Management designation. Some notable long-term clients consist of: Harris County, Angleton ISD, City of Pearland and City of Houston.

Wes is a dedicated insurance professional born and raised in Brazoria County, where he still resides. He holds a BBA in finance as well as a Master of Business Administration, providing a strong foundation in financial and strategic management. Wes has been with McGriff for a year and a half, specializing in serving public entities. During his tenure, he has worked closely with notable clients including Sweeny ISD, Van Vleck ISD, and the City of Freeport. His local roots and comprehensive expertise enable him to deliver tailored solutions that meet the unique needs of public sector organizations in Brazoria County and beyond.

Our local resources, Texas County experience, large claims team, risk analytics services, and strong underwriting relationships will be of value to Brazoria County. We are familiar with the exposures faced by Brazoria County and the surrounding counties.

Our partners include long-standing, senior-level relationships with underwriters that serve public entities, third-party administrators, restoration contractors and legal defense firms. Your access to all properly credentialed carriers and vendors will be enhanced by our familiarity with these companies and our knowledge of their performance for other large Texas Counties/Public Entities.

McGriff/Hagan are committed to providing services for each line of insurance/reinsurance coverage as set forth in the Property and Casualty program for Brazoria County.

Why McGriff/Hagan for Brazoria County?

- Local service team familiar with the County operations
- \$200 billion annual Property Insurance premium volume
- Property Insurance advisor for several hundred Texas Public Entities
- Access to new and untapped markets for Windstorm, Flood, Cyber and other difficult exposures
- Experts in Alternative Risk Transfer products
- Ability to solve complex claims issues
- Strength of corporate balance sheet
- FEMA claims preparation expertise
- Disaster Management suite of services

4. Describe the insurance markets that the brokerage firm can access. Specify which of these insurance companies are most responsive to government needs.

McGriff/Hagan has access to all carriers that specialize in Texas County insurance programs, some of which are proprietary/exclusive relationships. We have provided a list of our carrier network on the following pages.

The list below is a sample of carriers that specialize in Texas County Insurance that we'd expect to be extremely competitive on Brazoria County's Property and Casualty Insurance program:

Texas County Insurance Carriers	
• Lloyds	• XL
• Brit	• Zurich
• Lexington	• Travelers
• Swiss Re	• Liberty
• AmRisc / Chronos	• One Beacon
• Chubb / Westchester	• Trident
• Axis	• Colony
• Velocity	• Safety National
• Endurance	• Midwest Employers
• Argo	• Berkshire
• RSUI	• Gemini
• Arch	• Great American
• Markel	• CNA
• CV Starr	• AIG
• Metis	• Old Republic
• Palomar	• TPS

AVAILABLE CARRIERS

Name	Name	Name	Name
* HARTFORD BULK REPORT	+CERTAIN INS. COMPANIES	AIG COMMERCIAL INSURANCE	AMBRIDGE PARTNERS LLC
*AMERICAN STATES INS GROUP	+LLOYDS OF LONDON	AIG ENERGY, INC.	AMCO INSURANCE COMPANY
*CHUBB & SON, INC.	+MAX RE EUROPE LIMITED	AIG ENVIRONMENTAL	AMERICA FIRST INSURANCE CO
*CHUBB & SON, INC. (CA)	+OIL CASUALTY INSURANCE LTD	AIG EXCESS LIABILITY INS INT'L	AMERICA FIRST LLOYDS INSURANCE
*CHUBB GROUP	+XL INSURANCE (BERMUDA) LTD.	AIG EXCESS LIABILITY INSURANCE	AMERICAN ALTERNATIVE INS CORP
*CIGNA INTERNATIONAL	5 STAR SPECIALTY PROGRAMS	AIG GLOBAL MARINE	AMERICAN ALTERNATIVE INS. CORP
*CNA	A C NEWMAN & COMPANY	AIG INDEMNITY INS. CO.	AMERICAN APPRAISAL ASSOC.INC
*CNA INS CO - DIRECT PAYA/C	A G ADMINISTRATORS	AIG LIFE INSURANCE COMPANY	AMERICAN AUTOMOBILE INS CO
*CNA INSURANCE CO. #360071639	A I G OIL RIG	AIG LIFE RIG	AMERICAN BANKERS INS CO OF FL
*CNA INSURANCE CO. #380-032055	A I SPECIALTY LINES INS CO	AIG PREMIER INSURANCE COMPANY	AMERICAN CAS.CO. OF READING,PA
*CNA INSURANCE CO. #770-073229	A. I. GLOBAL	AIG PRIVATE CLIENT GROUP	AMERICAN CASUALTY COMPANY OF
*CNA INSURANCE COMPANIES	AB RISK SPECIALIST INC	AIG PRIVATE CLIENT GRP-DIRECT	AMERICAN CENTRAL INS. CO.
*COMMERCIAL UNION INSURANCE	ACADIA INSURANCE COMPANY	AIG WORLDSOURCE/CO AMERICAN	AMERICAN COASTAL INS. COMPANY
*CONTINENTAL CASUALTY COMPANY	ACCEPTANCE CASUALTY INS CO	AIGRM SPECIAL BUSINESS	AMERICAN CONTEMPORARY INS. CO.
*CONTINENTAL INSURANCE COMPANY	ACCIDENT INSURANCE COMPANY INC	AIU INSURANCE COMPANY	AMERICAN CONTINENTAL INSURANCE
*CRUM & FORSTER INSURANCE CO	ACCREDITED SURETY & CASUALTY	AIU NO AMERICAN, INC	AMERICAN CONTRACT. INS GRP LTD
*CRUM-FORSTER INSURANCE, CO.	ACE (PROGRAMS DIRECT BILL)	AIU NORTH AMERICAN, INC	AMERICAN CONTRACTORS INDEM CO.
*DEPT. OF COMMERCE & CONSUMER	ACE AMER. F&M INS CO OF KOREA	AIX SPECIALTY INSURANCE CO	AMERICAN CONTRACTORS INS RRG
*FIREMAN'S FUND - SRS	ACE AMERICAN INS CO-GENIUS	AJ GALLAGHER THE STORAGE FIRST	AMERICAN CONTRACTORS INS. GRP.
*FIREMANS FUND COUNTY MUTUAL	ACE AMERICAN INSURANCE CO	AJ GALLAGHER(AL HOME BLD ONLY)	AMERICAN CREDIT INDEMNITY
*FIREMANS FUND INS CO	ACE AMERICAN INSURANCE CO.	AL CHARK INSURANCE CO (EGYPT)	AMERICAN DYNASTY
*FIREMAN'S FUND INS CO	ACE BERMUDA INSURANCE LTD	ALABAMA MUNICIPAL INS CORP	AMERICAN E&S INSURANCE BROKERS
*FIREMANS FUND INS. CO. OF GA	ACE EUROPEAN GROUP LIMITED	ALABAMA PUBLIC AUTO INS AGY	AMERICAN ECONOMY INS CO
*FIREMAN'S FUND INSURANCE CO	ACE FIRE UNDERWRITERS INS CO	ALaCOMP (BENEFIT CHOICES INC)	AMERICAN EMPIRE INSURANCE
*FIREMANS FUND INSURANCE CO.	ACE INA INSURANCE	ALASKA NATIONAL INSURANCE CO	AMERICAN EMPIRE SURPLUS LINES
*FIREMAN'S FUND INSURANCE CO.	ACE INSURANCE CO.(PUERTO RICO)	ALBANY INSURANCE COMPANY	AMERICAN EMPLOYERS' INSURANCE
*FIREMAN'S FUND PROD #01490045	ACE INSURANCE S.A. - N.V.	ALEA LONDON LIMITED	AMERICAN EQUITY INSURANCE CO
*FLORIDA DEPARTMENT OF	ACE INSURANCE S.A.- N.V.	ALEA NORTH AMERICA INS CO	AMERICAN EQUITY SPECIALTY INS
*GREAT AMERICAN INSURANCE CO	ACE LIMITED	ALESCO RISK MANAGEMENT SERVICE	AMERICAN EQUITY UNDERWRITERS
*GROUP HEALTH COOPERATIVE	ACE PROPERTY & CASUALTY	ALEXANDER & BROWN INS SRVC INC	AMERICAN FAMILY LIFE ASSURANCE
*HANOVER INSURANCE COMPANY	ACE SEGUROS, S.A.	ALEXANDER MORFORD & WOO (CA)	AMERICAN FAMILY LIFE INSURANCE
*HARLEYSVILLE INSURANCE	ACIG INC.	ALL RISKS LTD.	AMERICAN FEDERATED INS CO
*HARLEYSVILLE MUTUAL INS CO	ACIG INSURANCE COMPANY	ALLEGHANY INSURANCE	AMERICAN FIDELITY ASSURANCE CO
*HARTFORD BOND DEPARTMENT	ACSTAR INSURANCE COMPANY	ALLEGHENY SURETY AGENCY INC	AMERICAN FIRE AND CASUALTY CO
*HARTFORD CASUALTY INS COMPANY	ACUIY A MUTUAL INS CO	ALLEGiant MGMT SERVICES INC	AMERICAN GENERAL LIFE INS CO
*HARTFORD INSURANCE COMPANY	ADMIRAL INSURANCE COMPANY	ALLENDALE MUTUAL INSURANCE CO	AMERICAN GLOBAL INSURANCE CO
*INTERNATIONAL FIDELITY INS CO	ADRIATIC INSURANCE COMPANY	ALLIANT INSURANCE SERVICES	AMERICAN GUARANTEE & LIABILITY
*INTERNATIONAL MARINE UNDRWTRS	ADROIT MUTUAL BENEFITS LLC	ALLIANZ AUSTRALIA INS.LIMITED	AMERICAN HERITAGE LIFE INS CO
*MARINE OFFICE OF AMERICA	ADVANCED INS COVERAGES INC	ALLIANZ AVIATION MANAGERS LLC	AMERICAN HOME ASSURANCE CO
*MARINE OFFICE OF AMERICA,INC.	AEGIS INSURANCE SERVICES LTD	ALLIANZ GLOBAL CORP & SPEC	AMERICAN INSURANCE COMPANY
*MARYLAND CASUALTY COMPANY	AEGIS INSURANCE SERVICES, LTD.	ALLIANZ GLOBAL RISKS US INS CO	AMERICAN INTERNAT SPECIALTY
*Mississippi Dept. of Ins	AEGIS JANSON GREEN INS SERVICE	ALLIANZ LIFE INS CO OF NO AM	AMERICAN INTERNATIONAL
*NATIONWIDE AGRIBUSINESS INS	AEGIS SECURITY INS. CO.	ALLIANZ UNDERWRITERS INS. CO.	AMERICAN INTERNATIONAL CO
*NEW HAMPSHIRE INS CO	AEGIS SYNDICATE 1225	ALLIED BENEFITS SYSTEMS, INC.	AMERICAN INTERNATIONAL GROUP
*PENN NATIONAL INS. CO.	AETNA LIFE INSURANCE COMPANY	ALLIED P&C INSURANCE CO.	AMERICAN INTERNATIONAL INS.
*PMA INSURANCE GROUP	AETNA US HEALTHCARE INC.	ALLIED UNDERWRITING INC.	AMERICAN INTERNATIONAL INS. CO
*PMA REINSURANCE COMPANY	AETNA US HEALTHCARE OF N.TX.	ALLIED WORLD ASSUR CO EUROPE	AMERICAN INTERNATIONAL PACIFIC
*RELIANCE INS. CO	AFFILIATED FM INSURANCE	ALLIED WORLD ASSURANCE CO (US)	AMERICAN INTERNATIONAL UNION
*ROYAL & SUN ALLIANCE	AFFILIATED FM INSURANCE CO.	ALLIED WORLD ASSURANCE CO LTD	AMERICAN INTERNAT'L GROUP (CA)
*ST PAUL TRAVELERS (PORTLAND)	AFFINITY INS. SERVICES INC.	ALLIED WORLD NATIONAL	AMERICAN INTERSTATE INS CO
*ST. PAUL FIRE & MARINE INS.	AFFINITY INSURANCE SERV., INC.	ALLIED WORLD REINSURANCE CO	AMERICAN INTL CO TEXAS
*ST. PAUL TRAVELERS	AFFINITY PROGRAMS	ALLMERICA FINANCIAL BEN INS CO	AMERICAN INT'L SOUTH INS CO
*TEXAS STAMPING FEE	AFIANZADORA INSURGENTES S.A.	ALLSTAR FINANCIAL GROUP, INC.	AMERICAN INT'L SOUTH INS. CO.
*TEXAS STAMPING FEE (AL)	AGCS MARINE INSURANCE COMPANY	ALLSTAR SURETY COMPANY, INC.	AMERICAN INT'L UNDERWRITERS
*TRAVELERS	AGF BRASIL SEGUROS S.A.	ALLSTATE COUNTY MUTUAL INS CO.	AMERICAN LIFE & GENERAL INS CO
*WAUSAU INSURANCE CO	AGRITRUST OF GEORGIA	Allstate Fire& Casualty Co	AMERICAN LIFE INS CO
*WAUSAU INSURANCE CO.	AI RISK SPECIALISTS INS., INC.	ALLSTATE INDEMNITY COMPANY	AMERICAN LIFE INS CO LTD/KENYA
*WAUSAU INSURANCE COMPANY	AI RISK SPECIALISTS OF MO INC.	ALLSTATE INS CO - DIRECT BILL	AMERICAN LUMBER UNDERWRITERS
*WESTFIELD COMPANIES	AIG	ALLSTATE INS GROUP-DIRECT BILL	AMERICAN MANAGEMENT CORP
*ZURICH AMER. INS. CO BENEFITS	AIG ADVANTAGE INSURANCE CO.	ALTERRA AMERICA INSURANCE CO	AMERICAN MINING INSURANCE CO.
*ZURICH AMERICAN INS COMPANY	AIG AGENCY AUTO	ALTERRA EXCESS & SURPLUS	AMERICAN MODERN HOME INSURANCE
*ZURICH INSURANCE COMPANY	AIG AVIATION, INC.	ALTERRA EXCESS AND SURPLUS	AMERICAN MOTORISTS INS. CO.
+ACCEPTANCE INDEMNITY INS CO	AIG AVIATION INC. (TEXAS)	ALTERRA SPECIALTY INSURANCE	AMERICAN NATIONAL FIRE INS CO
+ACE INSURANCE COMPANY, LTD.	AIG CASUALTY COMPANY	AM GUARD INSURANCE COMPANY	AMERICAN NATIONAL INSURANCE CO
+ALLIED WORLD ASSURANCE US,INC	AIG CENTENNIAL INSURANCE CO.	AM INSURANCE	AMERICAN NAT'L GENERAL INS CO.

AVAILABLE CARRIERS (CONT.)

Name	Name	Name	Name
AMERICAN RELIABLE INS	ARCH INSURANCE COMPANY (EUROPE	AXIS REINSURANCE COMPANY	BLUE CROSS BLUE SHIELD OF OR
AMERICAN RISK FUNDING INS. CO.	ARCH INSURANCE COMPANY(SURETY)	AXIS SPECIALTY EUROPE LIMITED	BLUE CROSS BLUE SHIELD OF SC
AMERICAN SAFETY CASUALTY INS	ARCH REINSURANCE COMPANY	AXIS SPECIALTY INS. CO.	BLUE CROSS BLUE SHIELD OF TN
AMERICAN SAFETY INDEMNITY CO.	ARCH REINSURANCE LTD	AXIS SPECIALTY INSURANCE CO.	BLUE CROSS BLUE SHIELD OF TX
AMERICAN SAFETY INSURANCE CO	ARCH SPECIALTY INS. CO.	AXIS SPECIALTY LIMITED	BLUE CROSS BLUE SHIELD OF UTAH
AMERICAN SAFETY RRG, INC.	ARCH SPECIALTY INSURANCE CO.	AXIS SURPLUS INSURANCE CO.	BLUE SHIELD OF CALIFORNIA
AMERICAN SECRETARY INSURANCE	ARGO GROUP US. INC.	AXIS U.S. INSURANCE	BOILER & PROPERTY CONSULTING
AMERICAN SECURITY INS. CO.	ARGO RE LTD	AXIS U.S. INSURANCE (GA)	BOLLINGER, INC
AMERICAN SOUTHERN INS CO	ARGONAUT GREAT CENTRAL INS CO	BAHAMAS FIRST GENERAL	BOND EXPERTS II LTD
AMERICAN SPECIALTY INS & RISK	ARGONAUT INSURANCE CO (SURETY)	BAILEY SPECIAL RISKS INC.	BOND NOTARY FEES
AMERICAN SPIRIT INSURANCE CO.	ARGONAUT INSURANCE COMPANY	BANKERS INSURANCE COMPANY	BOND SAFEGUARD INSURANCE CO
AMERICAN STANDARD LLOYD'S INS	ARGONAUT-MIDWEST INSURANCE CO	BANKERS STANDARD INSURANCE CO.	BORDEN-PERLMAN INS AGENCY INC
AMERICAN STATES INS CO OF TX	ARIEL REINSURANCE COMPANY LTD	BANNER LIFE INSURANCE COMPANY	BOSTON MUTUAL LIFE INS. CO.
AMERICAN STATES INSURANCE CO.	ARISE BOILER INSPECTION & INS	BARBER STEWART MCVITTIE &	BOSTON OLD COLONY INSURANCE CO
AMERICAN STATES LIFE INS CO	ARISE, INC.	BARTLETT, BAGGETT & SHANDS	BRAISHFIELD ASSOCIATES, INC
AMERICAN STATES LLOYDS INS CO	ARROWHEAD GENERAL INS AGENCY	BASS UNDERWRITERS INC.	BRICKSTREET MUTUAL INS CO
AMERICAN STEAMSHIP MUTUAL P&I	ARTEX RISK SOLUTIONS	BB&T Insurance Services	BRICKSTREET MUTUAL INS. CO
AMERICAN STRATEGIC INSURANCE	ARTHUR J. GALLAGHER & CO	BB&T PREFERRED BUSINESS	BRIDGEFIELD CASUALTY INS. CO.
AMERICAN UNION RISK ASSOC,LLC	ARTHUR J. GALLAGHER(UK) LTD.	BB&T TANNER INSURANCE SERVICES	BRIDGEFIELD EMPLOYERS INS CO
AMERICAN UNITED LIFE INS. CO.	ARTISAN & TRUCKERS CASUALTY CO	BB&T/CARSON INS. SERVICES	BRIT GLOBAL SPECIALTY
AMERICAN WESTERN HOME INS CO	ASCOT UNDERWRITING INC.	BB&T/LANDRUM VAEGER	BRITT/PAULK INS AGENCY INC.
AMERICAN WHOLESALERS UND LTD	ASEGURADORA MEXICANA S.A.	BCS INSURANCE COMPANY	BROKERS NATIONAL LIFE ASSURANC
AMERICAN ZURICH INSURANCE CO.	ASPEN AMERICAN INS CO (SURETY)	BE&G INS. & R/I	BROKER'S RISK PLACEMENT SERV
AMERICANA PROGRAM UNDERWRITERS	ASPEN AMERICAN INSURANCE CO	BEAZLEY INSURANCE COMPANY	BROOKWOOD INSURANCE COMPANY
AMERHEALTH CASUALTY INS CO	ASPEN INSURANCE LIMITED	BEAZLEY, USA INC.	BROWN & BROWN MARINE
AMERHEALTH CASUALTY SERVICES	ASPEN INSURANCE UK LIMITED	BELLINGHAM UNDERWRITERS INC.	BROWN & BROWN OF CALIFORNIA
AMERISURE COMPANIES	ASPEN SPECIALTY INS CO	BENCHMARK INSURANCE CO.	BROWN & RIDING INS SVCS INC
AMERISURE INSURANCE COMPANY	ASPEN SPECIALTY INS MANAGEMENT	BENCHMARK MANAGEMENT GROUP INC	BROWN YARD PROGRAMS , LTD.
AMERISURE MUTUAL INSURANCE CO	ASSOCIATED INDEMNITY CORP	BENEFIT PROTECT LLC	BUILDERS INS GROUP-AGENCY BILL
AMERITAS LIFE INSURANCE CORP	ASSOCIATED INS ADMINISTRATORS	BERKEY AGENCY, LTD.	BUILDERS INS GROUP-DIRECT BILL
AMERITAS LIFE INSURANCE CORP.	ASSOCIATED INTERNATIONAL INS.	BERKLEY ADMINISTRATORS	BUILDERS INSURANCE GROUP
AmFed NATIONAL INSURANCE CO.	ASSOCIATION INS. CO.	BERKLEY ASSET PROTECTION	BURKE-DANIELS CO., INC.
AMLIN EUROPE N.V.	ASSURANCE COMPANY OF AMERICA	BERKLEY AVIATION LLC	BURLINGTON INSURANCE COMPANY
AMRISC, LP	ASSURANCEFORENINGEN GARD-	BERKLEY INSURANCE COMPANY	BURNETT & COMPANY, INC.
AMTRUST GROUP	ASSURANT INSURANCE GROUP	BERKLEY LIFE & HEALTH INS CO	BURNS & WILCOX, LTD.
AMTRUST INS COMPNAV OF KANSAS	ATAIN SPECIALTY INSURANCE CO	BERKLEY NATIONAL INSURANCE CO	BUSINESS INSURANCE GROUP
AMTRUST INTNL UNDRWRTS LIMITED	ATESHGHAH INSURANCE COMPANY	BERKLEY OIL & GAS SPECIALTY	BUSINESSFIRST INSURANCE CO.
AMTRUST SOUTH	ATHENA ASSURANCE COMPANY	BERKLEY PROFESSIONAL LIAB LLC	C G & B GROUP
ANCHOR MANAGING AGENCY	ATLANTIC CASUALTY INSURANCE CO	BERKLEY REGIONAL INSURANCE CO	C PRO ASSOCIATES
ANESTHESIOLOGIST'S PROF ASSR	ATLANTIC CHARTER INS CO-DIRECT	BERKLEY RENEWABLE ENERGY	C. A. SHEA & COMPANY, INC.
ANTHEM HEALTH PLANS OF VA	ATLANTIC INSURANCE CO	BERKLEY SURETY GROUP LLC	CALIFORNIA INSURANCE COMPANY
ANTHEM HEALTH SYSTEMS	ATLANTIC MUTUAL COMPANY	BERKSHIRE HATHAWAY HOMESTATE	CANADA LIFE ASSURANCE COMPANY
ANV UNDERWRITERS INC	ATLANTIC MUTUAL INS CO.	BERKSHIRE HATHAWAY INS. GROUP	CANADA REVENUE AGENCY
AON (BERMUDA) LTD	ATLANTIC SECURITY LTD (BDA)	BEVCAP MANAGEMENT LLC	CANADIAN GENERAL INSURANCE CO
AON AZERI INS.& REINS.BROKERS	ATLANTIC SPECIALTY INS CO.	BILL BEATTY INS AGENCY INC	CANAL INDEMNITY COMPANY
AON GROUP LIMITED (JFS)	ATRADIUS TRADE CREDIT INS INC	BISYS SPECIALTY PROGRAMS	CANAL INSURANCE COMPANY
AON GROUP LIMITED (JFS)	AUDUBON INDEMNITY COMPANY	BITUMINOUS CASUALTY CORP	CAPACITY MARINE CORPORATION
AON GROUP LIMITED (NICHOLSON)	AUDUBON INSURANCE COMPANY	BITUMINOUS INSURANCE CO	CAPITAL HEALTH PLAN, INC.
AON GROUP LIMITED(ALEX HOWDEN)	AUTO OWNERS INSURANCE CO.	BLACK WHITE& ASSOC.INS.BROKERS	CAPITOL INDEMNITY CORPORATION
AON NORWAY AS	AVIATION INS BROKERS OF NORTH	BLADES MARINE	CAPITOL SPECIAL RISK, INC
AON REED STENHOUSE, INC.	AVIATION INSURANCE MANAGERS	BLAIS EXCESS & SURPLUS AGENCY	CAPITOL SPECIALTY INS CORP.
AON RISK SERVICES OF TEXAS	AVIATION RISK CONSULTING INC.	BLISS & GLENNON INC	CAPTIAL BLUE CROSS
AON/HUNTINGTON T. BLOCK INS CO	AVIVA INSURANCE CO. OF CANADA	BLUE CROSS BLUE SHEILD	CAPTIVE RESOURCES LLC
APEX INSURANCE SERVICES	AXA ART INSURANCE CORP	BLUE CROSS BLUE SHIELD OF	CARITEN HEALTH PLAN
APPALACHIAN UNDERWRITERS, INC.	AXA CORPORATE SOLUTIONS INS CO	BLUE CROSS BLUE SHIELD OF FL	CARMOUCHE INSURANCE INC.
APPLICATION COMPANY	AXA CORPORATE SOLUTIONS LLOYDS	BLUE CROSS BLUE SHIELD OF FLA	CAROLINA CASUALTY INSURANCE CO
APPLIED UNDERWRITERS INC	AXA EQUITABLE LIFE INS. CO.	BLUE CROSS BLUE SHIELD OF GA	CASTLEPOINT INSURANCE COMPANY
ARAB INSURANCE GROUP (BSC)	AXA GLOBAL RISKS	BLUE CROSS BLUE SHIELD OF IA	CATAWBA INSURANCE CO. (FLOOD)
ARAB MISR INS GROUP (AMIG)	AXA INSURANCE COMPANY	BLUE CROSS BLUE SHIELD OF IL	CATLIN INSURANCE CO (UK) LTD
ARABIAN AMERICAN INSURANCE CO	AXA NORDSTERN ART INS. CORP.	BLUE CROSS BLUE SHIELD OF LA	CATLIN INSURANCE CO, LTD TX
ARBELLA PROTECTION INS CO	AXA RE INSURANCE GROUP	BLUE CROSS BLUE SHIELD OF MI	CATLIN INSURANCE COMPANY INC
ARC-EN INSURANCE SERVICES, INC	AXA RE PROPERTY & CASUALTY INS	BLUE CROSS BLUE SHIELD OF MS	CATLIN INSURANCE COMPANY INC.
ARCERI & ASSOCIATES INC	AXA SEGUROS S.A. DE CV	BLUE CROSS BLUE SHIELD OF NC	CATLIN SPECIALTY INSURANCE CO.
ARCH EXCESS & SURPLUS INS. CO.	AXIOM INSURANCE MANAGEMENT LTD	BLUE CROSS BLUE SHIELD OF NM	CATLIN UNDERWRITING AGENCY
ARCH INSURANCE COMPANY	AXIS INSURANCE COMPANY	BLUE CROSS BLUE SHIELD OF OK	CCI SURETY INC

AVAILABLE CARRIERS (CONT.)

Name
CENTRAL INSURANCE SERVICES LTD
CENTRE INSURANCE COMPANY
CENTURY HEALTHCARE LLC
CENTURY SURETY COMPANY
CENTURY SURETY UNDERWRITER
CENTURY-NATIONAL INSURANCE CO
CHAMBER INS AGENCY SERVICES
CHARITY FIRST
CHARTER OAK FIRE INSURANCE CO
CHARTIS AEROSPACE INS SVCS INC
CHARTIS EUROPE LIMITED
CHARTIS EXCESS LIMITED
CHARTIS INC.
CHARTIS INS CO PUERTO RICO
CHARTIS INS HONG KONG LIMITED
CHARTIS INSURANCE CO OF CANADA
CHARTIS PROPERTY & CASUALTY CO
CHARTIS SPECIALTY INS CO
CHICAGO INSURANCE COMPANY
CHICAGO UNDERWRITING GROUP INC
CHITTENDEN INSURANCE GROUP
CHUBB
CHUBB & SON
CHUBB ATLANTIC INDEMNITY LTD
CHUBB CUSTOM INS. CO.
CHUBB INDEMNITY INSURANCE CO
CHUBB INS CO OF EUROPE SA
CHUBB LLOYD'S INS. CO. OF TX
CHUBB INS. CO.OF AUSTRALIA LTD
CHUBB INSURANCE CO. OF CANADA
CHUBB LLOYD'S INS. CO. OF TX
CHUBB NATIONAL INSURANCE CO.
CHUBB SPECIAL
CIBA INSURANCE SERVICES
CIGNA HEALTH & LIFE INS CO
CIGNA HEALTHCARE OF TEXAS INC
CIGNA HEALTHCARE VOLUNTARY
CINCINNATI INSURANCE CO
CITADEL INSURANCE COMPANY
CITIZENS INS CO OF AMERICA
CITIZENS PROPERTY INS. CORP.
CITY COUNTY INS SERVICES
CITY COUNTY PROPERTY CASUALTY
CK SPECIALTY INSURANCE
CLARENDON AMERICA INS. CO.
CLARENDON NATIONAL INS CO
CLASSIC INSURANCE
CLEARWATER INSURANCE COMPANY
CLEARWATER MARINE
CM&F GROUP, INC.
CNA
CNA CCC RISK MANAGEMENT (PROP)
CNA HEALTHPRO
CNA INSURANCE COMPANIES
CNA INSURANCE COMPANY LIMITED
CNA INTERNATIONAL
CNA PRO - INSURANCE
CNA SURETY
CNA SURETY (ACCTS RECEIVABLE)
CNA SURETY ACCTG DEPT-ATTN:A/R
CNA SURETY CORPORATION GROUP
CNA/CCC RISK MANAGEMENT
COCHRANE & COMPANY
CODAN INSURANCE LTD
CODAN MARINE SERVICES

Name
COGENT RESOURCES LTD
COLEMONT INS BROKERS OF GA LLC
COLEMONT INS BROKERS OF TX LP
COLEMONT INSURANCE BROKERS OF
COLONIA INSURANCE CO
COLONIAL AMERICAN CASUALTY &
COLONIAL COUNTY MUTUAL INS CO
COLONIAL LIFE & ACCIDENT
COLONY INSURANCE COMPANY
COLONY NATIONAL INSURANCE CO.
COLONY SPECIALTY INSURANCE CO.
COLUMBIA CASUALTY COMPANY
COLUMBIA MUTUAL INSURANCE CO
COMBINED INSURANCE CO OF AMER
COMBINED SPECIALTY INS CO
COMMERCE & INDUSTRY INS. CO.
COMMERCIAL INSURANCE CO. OF
COMMERCIAL SECTOR INS BROKERS
COMMERCIAL UNDERWRITERS INS CO
COMMERCIAL UNION ASSURANCE CO
COMMONWEALTH INSURANCE COMPANY
COMPANHIA DE SEGUROS ALIANCADA
COMPANION COMMERCIAL INSURANCE
COMPANION LIFE INSURANCE CO
COMPANION PROPERTY & CASUALTY
COMPANY HEALTH COVERAGE
CONNECTICUT INDEMNITY CO
CONNECTICUT SPECIALTY INS. CO.
CONNECTICUTT GENERAL LIFE
CONSOLIDATED AMERICAN INS. CO.
CONSUMERS COUNTY MUTUAL INS
CONTINENTAL - LLOYD'S
CONTINENTAL CASUALTY CO
CONTINENTAL DIVIDE INS CO
CONTINENTAL INSURANCE CO
CONTINENTAL WESTERN INS. CO.
CONTRACTORS BONDING AND INS CO
COOPER GAY RISKS SERVICES INC.
COOPER GAY STEELE
COREGIS INDEMNITY CO
COREGIS INSURANCE COMPANY
CORNHUSKER CASUALTY COMPANY
CORPORACION CONTINENTAL
CORPORATE OFFICERS & DIRECTORS
COTTON FIRE & MARINE
COVENANT MANAGEMENT INC
COVENANT MANAGEMENT LLC
COVENTRY HEALTH & LIFE INS CO
COVENTRY INS CO
COVINGTON SPECIALTY INS CO
CRC INSURANCE SERVICES, INC
CRC INSURANCE SERVICES, INC.
CRC OF TEXAS, INC.
CRC UNDERWRITING
CROSSPOINT
CROUSE & ASSOCIATES
CRUM & FORSTER
CRUM & FORSTER INDEMNITY CO.
CRUM & FORSTER SPEC. INS. CO.
CRUMP E&S OF SAN FRANCISCO
CRUMP INS SERVICE OF HOUSTON
CRUMP INS SERVICES OF LA, INC
CRUMP INS SERVICES OF MEMPHIS
CRUMP INS SERVICES OF TX INC
CRUMP INSURANCE SERVICES

Name
CRUMP INSURANCE SERVICES INC
CRUMP INSURANCE SERVICES INC.
CRUMP INT'L LTD (BERMUDA)
CU LLOYDS OF TEXAS
CUNNINGHAM GROUP
CV STARR & COMPANY
CYPRESS INSURANCE COMPANY
DAKOTA SPECIALTY INSURANCE CO
DARWIN NATIONAL ASSURANCE CO.
DARWIN PROFESSIONAL U/W INC.
DARWIN SELECT INSURANCE CO.
DAUNTLESS SPECIALTY BROKERAGE
DEANS & HOMER
DEANS & HOMER (SELF STORAGE
DEEP SOUTH SURPLUS OF GA
DEEP SOUTH SURPLUS OF LA
DEEP SOUTH SURPLUS OF TEXAS
DEERFIELD INSURANCE COMPANY
DELTA DENTAL INSURANCE CO.
DELTA DENTAL OF VIRGINIA
DELTA LLOYD SCHADEVERZEKERING
DEPOSITORS INSURANCE COMPANY
DHOFAR INSURANCE COMPANY
DIAMOND STATE INSURANCE CO
DISCOVER PROPERTY & CASUALTY
DISCOVER REINSURANCE COMPANY
DISCOVER SPECIALTY INS.CO.
DISCOVERY MANAGERS, LTD.
DISTINGUISHED PROGRAMS
DOCTORS COMPANY INS GROUP
DOHA INSURANCE COMPANY - QSC
DONG
DONGBU INSURANCE COMPANY LTD
DOVETAIL MANAGING GENERAL AGCY
E RISK SERVICES
EAGLE STAR INSURANCE CO LTD
EASTERN INS. BROKERS LTD.(EC)
EBCO AVIATION UNDERWRITERS INC
ECCLESIASTICAL INS COMPANY
ECONOMY FIRE & CASUALTY CO
ECONOMY PREFERRED INSURANCE CO
EDGEWATER HOLDINGS COMPANY
EDGEWOOD PARTNERS INS CENTER
EFP WORKERS COMPENSATION FUND
EFU GENERAL INSURANCE
EL ROBLE, SA
EMPIRE FIRE & MARINE INS. CO.
EMPIRE GENERAL LIFE ASSURANCE
EMPIRE INDEMNITY INS. CO.
EMPLOYERS COMP ASSOCIATES, INC
EMPLOYERS COMPENSATION INS CO
EMPLOYERS FIRE INSURANCE
EMPLOYERS INS CO OF NEVADA
EMPLOYERS INS OF WAUSAU
EMPLOYERS MUTUAL CASUALTY CO
ENCOMPASS HOME AND AUTO INS CO
ENCOMPASS INDEPENDENT INS CO.
ENCOMPASS INSURANCE COMPANY
ENCOMPASS INSURANCE COMPANY OF
ENCOMPASS PROPERTY & CASUALTY
ENDURANCE AMERICAN INS COMPANY
ENDURANCE INSURANCE COMPANY
ENDURANCE RISK SOLUTIONS
ENDURANCE SPECIALTY INC, LTD
ENDURANCE SPECIALTY INS. LTD.

Name
ENERGI INSURANCE SERVICES INC
ENERGY INSURANCE MUTUAL
ENERGY TECHNICAL UNDERWRITERS
ENNIA CARIBE SCHADE NV
ENTERTAINMENT PRO INSURANCE
ENVIRONMENTAL INS SERVICES INC
ENVIRONMENTAL POLLUTION GROUP
ENVIRONMENTAL UNDERWRITING
EQUINOX UNDERWRITING
EQUITY PARTNERS INS SERVICES
ERC FRANKONA REINSURANCE LTD
ESIS, INC.
ESSEX INSURANCE COMPANY
EUCLID MANAGERS
EULER HERMES AMERICAN CREDIT
EVANSTON INSURANCE COMPANY
EVEREST INDEMNITY INSURANCE CO
EVEREST NATIONAL
EVEREST NATIONAL INSURANCE CO
EVEREST REINSURANCE CO
EVEREST SECURITY INSURANCE CO
EVERGREEN NATIONAL INDEMNITY
EXCEL INSURANCE BROKERS
EXCELSIOR INSURANCE COMPANY
EXECUTIVE LIABILITY
EXECUTIVE RE INDEMNITY CO
EXECUTIVE RISK INDEMNITY, INC
EXECUTIVE RISK SPECIALTY INS
EXECUTIVE STRATEGIES INC./DBA
FACTORY MUTUAL INSURANCE CO
FAIRFAX FINANCIAL (USA) GROUP
FAIRFIELD INSURANCE COMPANY
FAIRMONT INSURANCE CO
FALVEY CARGO UNDERWRITING, LTD
FALVEY YACHTS INSURANCE
FARMERS INSURANCE EXCHANGE r
FARMINGTON CASUALTY CO.
FARMLAND MUTUAL INSURANCE CO
FCCI COMMERCIAL INSURANCE CO.
FCCI INSURANCE COMPANY
FCCI INSURANCE GROUP
FEDERAL INSURANCE COMPANY
FEDERAL KEMPER LIFE INSURANCE
FEDERATED RURAL ELECTRIC
FEDERATION INS CO OF CANADA
FIANZAS MONTERREY
FIDELIS CONTINENTAL LLC
FIDELITY & CASUALTY INS. CO.
FIDELITY & DEPOSIT CO MARYLAND
FIDELITY & DEPOSIT CO. OF MD.
FIDELITY & GUARANTY INS. CO.
FIDELITY & GUARANTY INS. UND.
FIDELITY AND DEPOSIT COMPANY
FIDELITY EXCESS & SURPLUS INS
FIDELITY NATIONAL INDEMNITY
FIDELITY NATIONAL INSURANCE CO
FIDELITY NATIONAL PROP & CAS
FIDELITY SECURITY LIFE
FINANCIAL INDEMNITY COMPANY
FIRE & CASUALTY INSURANCE
FIRE AND CASUALTY INS OF CT
FIREMAN'S INSURANCE COMPANY OF
FIREMEN'S INS CO OF NEWARK, NJ
FIRST AMERICAN INSURANCE CO.
FIRST CITY INSURANCE BROKERS

AVAILABLE CARRIERS (CONT.)

Name	Name	Name	Name
FIRST FINANCIAL INSURANCE CO	GLENS FALLS INSURANCE CO	GULF UNDERWRITERS INS CO	HOUSTON SPECIALTY INS CO
FIRST FLORIDIAN AUTO AND HOME	GLOBAL AEROSPACE UNDERWRITING	H S B ENGINEERING INS. LTD	HOWDEN INS BROKERS (LONDON)
FIRST LIBERTY INS CORP	GLOBAL AEROSPACE, INC.	H W WOOD LIMITED	HOWDEN INS BROKERS INC. (USA)
FIRST LIBERTY INSURANCE CORP.	GLOBAL BENEFITS GROUP/TIECARE	HALLMARK COUNTRY MUTUAL INS CO	HPSO
FIRST MERCURY INS. CO.	GLOBAL SPECIAL RISKS, LLC	HALLMARK INSURANCE GROUP	HSB GLOBAL LARGE RISK(EMD-BHAM
FIRST NAT'L INS CO OF AMERICA	GLOBEX INTERNATIONAL GROUP	HALLMARK SPECIALTY INS. CO.	HUATAI INSURANCE COMPANY OF
FIRST NONPROFIT INSURANCE CO	GMAC RE CORPORATION	HALTON HALL & ASSOCIATES	HUDSON FINANCIAL PRODUCTS
FIRST PENN-PACIFIC LIFE INS CO	GMG UNDERWRITERS INC.	HANOVER AMERICAN INS. CO.	HUDSON INSURANCE COMPANY
FIRST REINSURANCE COMPANY	GOLDEN BEAR INSURANCE COMPANY	HANOVER LLOYDS INSURANCE CO.	HUDSON SPECIALTY INS CO
FIRST SEALORD SURETY, INC.	GOLDEN EAGLE INSURANCE CORP.	HANSEATIC INSURANCE COMPANY	HUDSON SPECIALTY INSURANCE CO
FIRST SPECIALTY INSURANCE CORP	GOTHAM INSURANCE COMPANY	HARCO NATIONAL INSURANCE CO	HULL & COMPANY
FLORIDA HOSPITALITY MUTUAL	GRANITE STATE INSURANCE CO.	HARLEYSVILLE PREFERRED INS CO	HUMANA INSURANCE COMPANY
FLORIDA INT'L INDEMNITY CO	GRAY INSURANCE COMPANY	HARLEYSVILLE WORCESTER INS CO.	HUNTER, KELTY, MUNTZ &
FM GLOBAL GROUP	GREAT AMERICAN ALLIANCE INS CO	HARTFORD ACCIDENT & INDEMNITY	HUNTERSURE LLC
FM INSURANCE COMPANY LIMITED	GREAT AMERICAN ASSURANCE CO.	HARTFORD FINANCIAL PRODUCTS	HURTADO & ASSOCIATES INC.
FORAM BROKERAGE, LTD	GREAT AMERICAN E & S INS CO	HARTFORD FIRE INS. CO. - FLOOD	I O A RE
FOREMOST COUNTY MUTUAL	GREAT AMERICAN FIDELITY INS CO	HARTFORD FIRE INSURANCE CO	IAN H. GRAHAM, INC.
FOREMOST INSURANCE COMPANY	GREAT AMERICAN INS AGENCY	HARTFORD FIRE INSURANCE CO.	ILLINOIS EMCASCO INSURANCE CO
FOREST INSURANCE FACILITIES	GREAT AMERICAN INS CO. -NON AC	HARTFORD INS CO OF THE MIDWEST	ILLINOIS NATIONAL INS. CO
FORT DEARBORN LIFE INS. CO.	GREAT AMERICAN INS. CO	HARTFORD INS OF THE SOUTHEAST	ILLINOIS UNION INSURANCE CO.
FORT DEARBORN LIFE INSURANCE	GREAT AMERICAN INS. CO.	HARTFORD INSURANCE CO/ILLINOIS	IMPERIUM INSURANCE CO
FORTIS CORPORATE INS NV	GREAT AMERICAN INS. CO. OF NY	HARTFORD INSURANCE COMPANY OF	IMS/LONDON AMERICAN INC
FOUNDERS INSURANCE COMPANY	GREAT AMERICAN INSURANCE	HARTFORD LIFE AND ACCIDENT	INDEMCO, L.P.
FRANCHISE INSURANCE GROUP, INC	GREAT AMERICAN INSURANCE (D&O)	HARTFORD LIFE INSURANCE CO.	INDEMNITY INS CO NORTH AMERICA
FRANK CRYSTAL & CO	GREAT AMERICAN PROTECTION	HARTFORD LLOYD'S INS. CO.	INDEPENDENCE CAS & SURETY
FREEDOM SPECIALTY INSURANCE	Great American Security Ins Co	HARTFORD SPECIALTY COMPANY	INDIAN HARBOR INSURANCE CO
FREEDOM SPECIALTY INSURANCE CO	GREAT CORNERSTONE LIFE & (TX)	HARTFORD STEAM BOILER	INDIANA LUMBERMAN'S MUTUAL
Fringe Insurance Benefits	GREAT DIVIDE INS COMPANY	HARTFORD STEAM BOILER & INSPEC	INDUSTRIAL INDEMNITY CO.
FULCRO INSURANCE INC	GREAT LAKES CASUALTY INS. CO.	HARTFORD STEAM BOILER GROUP	INDUSTRIAL INS. CO. OF HAWAII
FULCRUM INSURANCE COMPANY	GREAT LAKES INSURANCE COMPANY	HARTFORD UNDERWRITERS INS. CO.	INFRASSURE LTD
FULCRUM INSURANCE PROGRAMS	GREAT LAKES REINSURANCE (UK)	HARTFORD-SPECIALTY BILLING	INS CO OF STATE OF PENNSYLVANI
G & M MARINE INC.	GREAT LAKES REINSURANCE UK	HARVARD PILGRIM HEALTH CARE	INS. CO. OF STATE OF PA.
G CUBE INSURANCE SERVICES INC.	GREAT LAKES REINSURANCE UK PLC	HAWAII EMPLOYERS MUTUAL INS CO	INSURANCE CO. OF NORTH AMERICA
G J SULLIVAN COMPANY	GREAT MIDWEST INSURANCE CO.	HAWAII MEDICAL SERVICE	INSURANCE COMPANY OF EVANSTON
GAGLIARDI INSURANCE SERVICES	GREAT NORTHERN INSURANCE	HCC GLOBAL FINANCIAL PRODUCTS	INSURANCE COMPANY OF THE WEST
GALLAND GENERAL AGENCY INC.	GREAT POINT INS SERVICES, INC.	HCC INTERNATIONAL INS CO PLC	INSURANCE CORP. OF HANNOVER
GARD P&I (BERMUDA) LTD	GREATER GEORGIA LIFE	HCC LIFE INSURANCE COMPANY	INSURANCE INNOVATORS INC.
GARRISON INSURANCE BROKERS	GREATER NEW YORK MUTUAL INS CO	HCC SPECIALTY INSURANCE CO.	INSURANCE PROGRAMS OF AMERICA
GCUBE	GREAT-WEST LIFE ASSURANCE CO	HCC SPECIALTY UNDERWRITERS INC	INSURERS UNLIMITED INC.
GCUBE UNDERWRITING LIMITED	GREENWICH INSURANCE COMPANY	HDI-GERLING AMERICA INS CO	INSURETRUST COM LLC
GE FINANCIAL ASSURANCE	GREENWICH TRANSPORTATION	HDI-GERLING INDUSTRIAL INS CO	INSURISK EXCESS & SURPLS LINES
GESINGER HEALTH PLAN	GRESHAM & ASSOC.OF INDIANA INC	HEALTH NET LIFE INSURANCE CO.	INTEGON NATIONAL INSURANCE CO
GEMINI INSURANCE COMPANY	GRESHAM & ASSOCIATES	HEALTH SPECIAL RISK, INC.	INTEGON PREFERRED INSURANCE CO
GENATT ASSOCIATES INC	GROCCERS INSURANCE GROUP	HEALTHCARE WORKERS' COMP	INTEGRITY SURETY, LLC
GENERAL AGENCY SERVICES	GROSVENOR BROKERS AMERICA, LLC	HERMITAGE INSURANCE COMPANY	INTELLECTUAL PROPERTY INS.
GENERAL AGENTS INSURANCE CO.	GROUPAMA TRANSPORT	HIGH POINT UNDERWRITERS LLC	INTERCARGO INSURANCE COMPANY
GENERAL INS CO OF AMERICA	GROUPAMA, S.A.	HIGHLANDS INSURANCE CO	INTERNATIONAL AEROSPACE
GENERAL REINSURANCE CORP	GRUNDY WORLDWIDE	HIGHLANDS LLOYDS INS. CO.	INTERNATIONAL FACILITIES
GENERAL SEC INDEMNITY CO OF AZ	GRUPO NACIONAL PROVINCIAL S.A.	HIGHLANDS UNDERWRITERS INS CO	INTERNATIONAL GEN INS CO LTD
GENERAL SECURITY INS CO	GRUPO SEKURA	HIGHMARK CASUALTY INS CO	INTERNATIONAL INS. CO.
GENERAL STAR INDEMNITY CO.	GUARANTEE CO OF N AMERICA USA	HIIG CONSTRUCTION	International Placement
GENERAL STAR NATIONAL INS CO	GUARANTEE COMPANY OF NORTH	HISCOX INS CO (GUERNSEY LTD)	INTERNATIONAL RISK PLACEMENT
GENERALI IARD	GUARANTEE INSURANCE COMPANY	HISCOX INSURANCE COMPANY INC	INTERNATIONAL RISK SOLUTIONS
GENERALI PHILIPINAS INS. CO.	GUARANTEE LIFE INSURANCE CO	HISCOX SPECIALTY INS. CO. INC.	INTERNATIONAL SPECIAL RISKS
GENERALI-UNITED STATES BRANCH	GUARANTY NATIONAL INSURANCE CO	HISCOX, INC.	INTERNATIONAL SPECIALTY INC.
GENESEE GENERAL AGENCY	GUARDIAN LIFE INS CO AMERICA	HKMB INTERNATIONAL INS.BROKERS	INTERNATIONAL SPECIALTY, INC.
GENESIS INDEMNITY INS CO	GUIDEONE INSURANCE COMPANY	HM LIFE INSURANCE CO.	INTERNEX LLC
GEORGIA SURETY CO., INC.	GUIDEONE MUTUAL INS CO	HOLYOKE MUTUAL INS. COMPANY	INTERSTATE FIRE & CASUALTY
GERBER LIFE INSURANCE CO	GUIDEONE SPECIALTY MUTUAL INS	HOME STATE COUNTY MUTUAL	INTERSTATE INDEMNITY COMPANY
GERLING AMERICA INS CO	GUILFORD INSURANCE COMPANY	HOMELAND INSURANCE CO OF NY	INTN'L INS CO OF HANNOVER LTD
GERLING-KONZERN ALLGEMEINE	GULF AGENCY	HONG KONG SHANGHAI BANKING	INVESTORS INS CO OF AMERICA
GILES INSURANCE BROKERS	GULF COAST MARINE POOL CO.	HORIZON BLUE CROSS BLUE SHIELD	IRB-BRASIL RESSEGUROS S.A.
GILLINGHAM & ASSOCIATES	GULF COAST MARINE, INC.	HORNBECK OFFSHORE SERVICES INC	IRF ADMINISTRATORS LLC
GLATFELTER INSURANCE GROUP	GULF INSURANCE CO. (UK) LTD	HOUSTON CASUALTY CO EUROPE	IRIDIUM RISK SERVICES INC.
GLENCOE INSURANCE, LTD.	GULF INSURANCE COMPANY	HOUSTON CASUALTY COMPANY	IRONSHORE EUROPE LIMITED

AVAILABLE CARRIERS (CONT.)

Name	Name	Name	Name
IRONSHORE INDEMNITY INC	LIBERTY AGENCY U/W (SURETY)	MAX SPECIALTY INSURANCE CO.	NAGICO INSURANCE COMPANY LTD
IRONSHORE INS SERVICES LLC	LIBERTY BOND SERVICES	MAXIMUM INDEPENDENT BROKERAGE	NAI EXCESS & SURPLUS LINES
IRONSHORE INSURANCE LTD.	LIBERTY COUNTY MUTUAL INS CO	MAXUM INDEMNITY CO.	NAPCO, LLC
IRONSHORE SPECIALTY INSURANCE	LIBERTY INS. UNDERWRITERS, INC	MCDOUGALL RISK MANAGEMENT LLC	NAS INSURANCE SERVICES INC.
ISLAND HERITAGE INSURANCE CO	LIBERTY INSURANCE CORPORATION	McGOWAN & COMPANY INC	NAS SURETY GROUP
ISO-POLICY ANALYST USE ONLY	LIBERTY INTERNATIONAL	MCGOWAN EXCESS CASUALTY	NASON ASSOCIATES, INC.
ITAU SEGUROS SA	LIBERTY INT'L UNDERWRITERS	MECC LD (ATTENTA)	NASSAU U/W'S (NUA) AGENCY INS
IZZO INSURANCE SERVICES INC	LIBERTY MUTUAL FIRE INS. CO.	MED JAMES, INC.	NATIONAL CASUALTY COMPANY
J & N INSURANCE SERVICES	LIBERTY MUTUAL INS CO	MEDICAL ASSURANCE	NATIONAL EMPLOYEE BENEFIT CO.
J. C. STEVENS, INC.	LIBERTY MUTUAL INS EUROPE LTD	MEDICAL MUTUAL OF OHIO	NATIONAL FIRE & MARINE
J.H. BLADES	LIBERTY MUTUAL INSURANCE CO	MEDICAL PROTECTIVE COMPANY	NATIONAL FIRE INS CO HARTFORD
J.M.D. ROSS INSURANCE BROKERS	LIBERTY MUTUAL INSURANCE CO.	MEDMARC CASUALTY INSURANCE CO.	NATIONAL FIRE INSURANCE CO OF
JACOBSON, GOLDFARB & SCOTT	LIBERTY MUTUAL SURETY	MEDMARC INSURANCE GROUP	NATIONAL FLOOD SERVICES
JAMES GORMAN INSURANCE INC	LIBERTY NORTHWEST INS CORP	MEMIC INSURANCE AGENCY	NATIONAL HOLE-IN-ONE ASSN.
JAMES RIVER INSURANCE CO.	LIBERTY SURPLUS INS. CORP	MERCATOR RISK SERVICES INC.	NATIONAL INDEMNITY COMPANY
JAMISON SPECIAL RISK INS.	LIFE INS CO. OF NORTH AMERICA	MERCHANTS BONDING CO. (MUTUAL)	NATIONAL INS. PROFESSIONALS
JARDINE INTERNATIONAL LIMITED	LIFE INSURANCE COMPANY OF	MERCHANTS BONDING COMPANY	NATIONAL INSURANCE COMPANY
JEFFERSON PILOT FINANCIAL INS	LIFEWISE ASSURANCE COMPANY	MERCHANTS NATIONAL INS CO	NATIONAL INSURANCE PARTNERS
JEFFERSON PILOT LIFE	LIG MARINE MANAGERS, INC.	MESA UNDERWRITERS SPECIALTY	NATIONAL INTERSTATE INS. CO.
JLT AEROSPACE (NORTH AMERICA)	LIGHTHOUSE UNDERWRITERS, LLC	METROPOLITAN LIFE INSURANCE	NATIONAL LIAB. & FIRE INS. CO.
JLT OF ALBERTA, CANADA	LINCOLN NATIONAL LIFE INS CO	METROPOLITAN PROPERTY & CASUAL	NATIONAL RISK SOLUTIONS
JLT OF HONG KONG CHINA	LLOYD & PARTNERS, LTD.	MIC PROPERTY & CASUALTY	NATIONAL SECURITY FIRE/CAS INS
JLT OF SANTIAGO CHILE	LLOYD SADD INS BROKER LTD	MID-CENTURY INSURANCE COMPANY	NATIONAL SPECIALTY INS. CO.
JLT OF SOLBERG NORWAY	LLOYD'S OF LONDON SYND. 1688	MID-CONTINENT CASUALTY CO	NATIONAL SPECIALTY UNDRWRTRS
JLT OF SYDNEY AUSTRALIA	LLOYD'S OF LONDON SYND. 2020	MIDDLE OAK SPECIALTY	NATIONAL SURETY CORPORATION
JLT OF TORONTO CANADA	LLOYDS-(LONDON)	MIDDLESEX MUTUAL ASSURANCE CO	NATIONAL TRUCK UNDERWRITING
JLT RISK SOLUTIONS (BERMUDA)	LM INSURANCE CORPORATION	MIDLANDS MANAGEMENT CORP	NATIONAL TRUST INSURANCE CO
JLT SPECIALTY LTD (SOLUTIONS)	LOMBARD GENERAL INSURANCE CO.	MIDWEST EMPLOYERS CASUALTY CO	NATIONAL UNION FIRE INS CO/LA
JLT SPECIALTY LTD.	LONDON AMERICAN RISK SPECIAL.	MIDWEST MUTUAL INSURANCE CO.	NATIONS BONDING COMPANY
JOHN ALDEN LIFE INSURANCE CO	LONDON AVIATION UNDERWRITERS	MIDWESTERN INDEMNITY COMPANY	NATIONWIDE AGRIBUSINESS INS CO
JOHN HANCOCK LIFE INS. CO.	LONPAC INS BHD C/O JLT ASIA	MIGUEL ANGEL CAMANCHO TORRES	NATIONWIDE INS COMPANY OF AMER
JOHN HANDEL & ASSOCIATES INC	LOUISIANA WORKERS COMP. CORP.	MILLER INSURANCE SERVICES LTD.	NATIONWIDE LIFE INSURANCE CO.
JONES BROWN INC.	LUBA CASUALTY COMPANY	MILLERS MUTUAL FIRE INS CO-TX	NATIONWIDE MUTUAL INS. CO
K & K INS GROUP / AMO SERV CTR	LUMBERMAN'S UND ALLIANCE	MILLERS MUTUAL INSURANCE CO.	NAT'L BENEFITS RESOURCES INC
KAISER FOUNDATION HEALTH PLAN	LYNDON PROPERTY INSURANCE CO	MILWAUKEE CASUALTY INS COMPANY	NAT'L UNION FIRE INS CO/PA
KANAWHA INSURANCE COMPANY	MACAFEE & EDWARDS, INC.	MINING INSURANCE MARKETS	NAUTILUS INSURANCE COMPANY
KANSAS CITY FIRE & MARINE	MACLEAN ODDY (RT SPCL-DALLAS)	MINNESOTA LIFE INS COMPANY	NAVIGATORS INS SERV OF TX, INC
KANSAS MEDICAL MUTUAL INS CO.	MADISON NATIONAL LIFE INS.	Miscellaneous/Accounting use	NAVIGATORS INSURANCE COMPANY
KEITH D. PETERSON & CO., INC.	MAGNA CARTA COMPANIES	Miscellaneous/Referral Fee	NAVIGATORS INSURANCE GROUP
KEMPER PREFERRED	MAIDEN SPECIALTY INSURANCE CO	MISSOURI EMPLOYERS MUTUAL	NAVIGATORS SPECIALTY INS CO.
KENTUCKY EMPLOYERS MUTUAL INS.	MAIN STREET AMERICA GROUP	MONITOR LIABILITY MANAGERS INC	NBIS CONSTRUCTION & TRANSPORT
KEY RISK INSURANCE COMPANY	MALAYAN INSURANCE CO INC	MONROE GUARANTY INSURANCE	NCMIC INSURANCE COMPANY
KEY RISK MANAGEMENT SERVICES	MANCHESTER SPECIALTY PROGRAMS	MONTGOMERY INSURANCE COMPANY	NETHERLANDS INSURANCE COMPANY
KEYSTONE RISK PARTNERS, INC.	MANUFACTURERS ALLIANCE INS CO	MONTGOMERY MUTUAL INSURANCE CO	NEW ALLIANCE INS AGENCY INC
KINSALE INSURANCE COMPANY	MAPFRE TEPEYAC S.A.	MONTICELLO INS. CO.	NEW DAY UNDERWRITING MGMT LLC
KLEIN INSURANCE SERVICES, INC.	MARINE INDEMNITY INSURANCE	MONTLAKE CASUALTY /	NEW ENGLAND MUTUAL LIFE
KOREAN REINSURANCE COMPANY	MARINE INSURANCE COMPANY LTD	MONTPELIER REINSURANCE LTD.	NEW HAMPSHIRE INS. CO. LTD.
LA MERIDIONAL COMPANIA	MARINE N-SURANCE BROKERS	MONTPELIER US INSURANCE CO.	NEW INDIA ASSURANCE CO. LTD.
LA XCESS INSURANCE BROKERS INC.	MARINE UNDERWRITERS OF	MOREFAR MARKETING, INC.	NEW MARKETS INSURANCE AGENCY
LAMBENT RISK MANAGEMENT	MARKEL AMERICAN INS CO	MOUNT HAWLEY INS CO	NEW MEXICO MUTUAL CASUALTY CO
LANCASHIRE INS CO (UK) LIMITED	MARKEL GLOBAL MARINE &	MOUNT VERNON FIRE INSURANCE CO	NEW WORLD VENTURES, LTD.
LANCASHIRE INS COMPANY LIMITED	MARKEL INSURANCE COMPANY	MOUNTAIN LAUREL ASSURANCE CO.	NEW YORK MARINE & GENERAL INS.
LANCER INSURANCE COMPANY	MARKETSCOUT	MS & G INC. (DBA FORTRESS	NEWMAN MARTIN AND BUCHAN LTD
LANDMARK AMERICAN INS. CO.	MARKETSCOUT INC.	MSA INSURANCE COMPANY	NEWMARKET UNDERWRITERS INS CO
LANDMARK INSURANCE COMPANY	MARNITZ & ASSOCIATES INS INC	MSW Expense Reimbursements	NGIC
LARIM CORRETORA DE RESEGUROS	MARSH A/S (DEMARK)	MT MCKINLEY MANAGERS LLC	NGM INSURANCE COMPANY
LARK INSURANCE BROKING GROUP	MARSH GMBH (GERMANY)	MUNICH REINSURANCE	NIAGARA FIRE INSURANCE CO.
LAVARETUS UNDERWRITING AB	MARSH USA, INC.	MUNICH REINSURANCE AMERICA INC	NIC INSURANCE COMPANY
LEICHT GENERAL AGENCY	MARSH, LTD.	MUNICH-AMERICAN RISK PARTNERS	NIELSEN INSURANCE INC.
LEMAC & ASSOCIATES, INC.	MARYLAND LLOYD'S COMPANY	MUTUAL ASSURANCE ADMINISTRATORS	NIF GROUP INC. ETAL
LEMIC INSURANCE COMPANY	MARYLAND/HOME BLDRS INS PROG.	MUTUAL BOILER RE	NO AMERICAN SPECIALTY INS CO
LEXINGTON INSURANCE CO.	MASSACHUSETTS BAY INS CO	MUTUAL OF OMAHA INS. CO.	NOBLE ASSURANCE COMPANY
LEXINGTON INSURANCE COMPANY	MASSACHUSETTS CASUALTY	MXGA INC.	NOETIC SPECIALTY INSURANCE CO.
LEXON INSURANCE COMPANIES	MASSACHUSETTS MUTUAL LIFE	MYRON F. STEVES & COMPANY	NONPROFITS INSURANCE ALLICANCE
LIBERTY	MAX BERMUDA LTD	INAC REINSURANCE COPORATION	NORMAN-SPENCER AGENCY INC.

AVAILABLE CARRIERS (CONT.)

Name	Name	Name	Name
NORTH AMERICAN CAPACITY	PAIGE-RUANE INC	PROGRAM BROKERAGE CORP	RK HARRISON INS BROKERS LTD
NORTH AMERICAN ELITE INS.CO.	PAN AMERICAN LIFE INS CO	PROGRESSIVE NORTHWESTERN	RK HARRISON INSURANCE BROKERS
NORTH AMERICAN SPECIALTY INS	PARAGON INTERNATIONAL INS.	PROGRESSIVE AMERICAN INS. CO	RLI INSURANCE COMPANY
NORTH EAST INSURANCE COMPANY	PARK BERMUDA	PROGRESSIVE CASUALTY INS CO	RLI SURETY DIVISION
NORTH OF ENGLAND P&I	PARQUETTE & ASSOCIATES, INC.	PROGRESSIVE CASUALTY INS. CO.	ROANOKE TRADE SERVICES
NORTH PACIFIC INSURANCE CO	PARTNER REINSURANCE CO LTD	PROGRESSIVE CLASSIC INSURANCE	ROBERTS & CROW INC.
NORTH RIVER INSURANCE COMPANY	PARTNER REINSURANCE CO. LTD	PROGRESSIVE COMPANIES	ROCHDALE INSURANCE COMPANY
NORTH ROCK INSURANCE CO LTD	PARTNER REINSURANCE EUROPE LTD	PROGRESSIVE COUNTY MUTUAL INS	ROCK RIVER INSURANCE COMPANY
NORTHBRIDGE INDEMNITY INS CORP	PARTNERS RE IRELAND INSURANCE	PROGRESSIVE EXPRESS INS. CO.	ROCKHILL INSURANCE COMPANY
NORTHBROOK INDEMNITY	PARTNERS SPECIALTY GROUP LLC	PROGRESSIVE GULF INS COMPANY	ROCKWOOD CASUALTY INSURANCE CO
NORTHBROOK NATIONAL INS. CO.	PAUL REVERE LIFE INS. COMPANY	PROGRESSIVE HAWAII INSURANCE	ROCKY MOUNTAIN HOSPITAL AND
NORTHBROOK PROPERTY & CASUALTY	PEERLESS INSURANCE COMPANY	PROGRESSIVE MOUNTAIN INS CO	ROPNER INSURANCE SERVICES
NORTHERN INSURANCE CO. OF NY	PELICAN GENERAL INS AGENCY LLC	PROGRESSIVE NORTHERN INS. CO.	ROYAL & SUN ALLIANCE INS PLC
NORTHERN INSURANCE COMPANY OF	PENN LUMBERMANS MUTUAL INS	PROGRESSIVE PALOVERDE INS. CO.	ROYAL INDEMNITY COMPANY
NORTHFIELD INSURANCE COMPANY	PENN MILLERS INSURANCE COMPANY	PROGRESSIVE PREFERRED INS CO	ROYAL INSURANCE CO. OF CANADA
NORTHLAND INSURANCE COMPANY	PENN NATIONAL MUTUAL CASUALTY	PROGRESSIVE SECURITY INS CO.	ROYAL LLOYDS INSURANCE COMPANY
NORTHWESTERN PACIFIC INDEMNITY	PENN NATIONAL SECURITY INS CO	PROGRESSIVE SOUTHEASTERN IN CO	ROYAL SURPLUS LINES INS. CO.
NORWEGIAN HULL CLUB	PENN-AMERICA INS CO	PROGRESSIVE SPECIALTY	RPS (RISK PLACEMENT SERVICES)
NOVA CASUALTY COMPANY	PENN-STAR INSURANCE COMPANY	PROGRESSIVE WEST INS. COMPANY	RSUI INDEMNITY COMPANY
NSM INSURANCE GROUP	PENNSYLVANIA GENERAL INS CO	PRONATIONAL INSURANCE COMPANY	RUTHERFOORD INTERNATIONAL INC.
NUCLEAR ELECTRIC INSURANCE LTD	PENNSYLVANIA MFG ASSN INS CO	PROPERTY & CASUALTY INSURANCE	RVI GUARANTY CO., LTD
NUERNBERGER ALLGEMEINE	PENNSYLVANIA MFR INDEMNITY CO	PROSIGHT SPECIALTY INSURANCE	SAFECO INS CO OF ILLINOIS
NUTMEG INSURANCE COMPANY	PENTAL INSURANCE COMPANY LTD	PROTECTIVE LIFE INS. CO.	SAFECO SURPLUS LINES INS. CO.
OAK RIVER INSURANCE COMPANY	PEOPLES INSURANCE CO CHINA	PROVIDENCE HEALTH PLAN	SAFEGUARD GUARANTEE CO. LTD
OCEAN CONSULTING GROUP	PHILADELPHIA INDEMNITY INS CO	PROVIDENT LIFE & ACCIDENT	SAFETY FIRST INSURANCE COMPANY
ODYSSEY AMERICA REINSURANCE	PHILADELPHIA INDEMNITY INS.CO	PROVIDENT MANAGERS, L.L.C.	SAFETY MUTUAL CASUALTY CORP.
OHIO CASUALTY INSURANCE CO.	PHILADELPHIA INSURANCE CO	PRUDENTIAL INS. CO OF AMERICA	SAFETY NATIONAL CASUALTY CORP
OHIO FARMERS INSURANCE COMPANY	PHILAM INSURANCE CO., LTD.	PT. TUGU PRATAMA KRESNA	SAMPO INDUSTRIAL INSURANCE N V
OHIO SECURITY INSURANCE CO	PHOENIX ASSURANCE COMPANY NY	PUBLIC RISK UNDERWRITING	SARGASSO MUTUAL INS. CO. LTD.
OIL INSURANCE LIMITED (DIRECT)	PHOENIX ASSURANCE COMPANY, LTD	PURVES REDMOND LIMITED	SCA PROMOTIONS
OKLAHOMA SPECIALTY INS COMPANY	PHOENIX AVIATION MANAGERS, INC	QATAR GENERAL INS. & REINS. CO	SCHWARZMEER UND OSTSEE
OKLAHOMA SURETY CO.	PHOENIX GROUP OF INS BROKERS	QBE INSURANCE (AUSTRALIA)	SCHWEIZERISCHE NATIONAL-VERS
OLD AMERICAN COUNTY MUTUAL	PHOENIX SPECIAL RISK	QBE INSURANCE CORPORATION	SCOR GLOBAL P&C SE
OLD REPUBLIC CONSTRUCTION	PHYSICIANS RECIPROCAL INSURERS	QBE MERCANTILE MUTUAL	SCOR UK COMPANY LIMITED
OLD REPUBLIC GENERAL INS CORP	PICC PROPERTY & CASUALTY LTD	QBE SPECIALTY INSURANCE CO	SCOTT AND WHITE HEALTH PLAN
OLD REPUBLIC INSURANCE CO	PING AN PROPERTY & CASUALTY	QUANTA REINSURANCE U.S. LTD.	SCOTTSDALE INDEMNITY
OLD REPUBLIC SURETY	PIONEER SPECIALTY INS GROUP	QUANTA SPECIALTY LINES INS CO	SCOTTSDALE INDEMNITY COMPANY
OMAHA PROPERTY AND CASUALTY	PLATTE RIVER INSURANCE COMPANY	QUIRK & COMPANY	SCOTTSDALE INSURANCE CO
OMAN INSURANCE COMPANY (PSC)	PMA INSURANCE GROUP	R I S C, INC.	SEABOARD SURETY COMPANY
OMEGA US INSURANCE INC.	PMA INSURANCE GRP-CAPTIVE	R&Q MARINE SERVICES LTD	SEABRIGHT INSURANCE COMPANY
ONE BEACON PROFESSIONAL INS	POINTSURE INSURANCE SERVICES	R. MEARS & CO. LTD.	SEABURY & SMITH
ONEBEACON AMERICA INS. CO.	POLICY MANAGERS	R+V VERSICHERUNG AG	SEAHORSE UNDERWRITERS
ONEBEACON ENTERTAINMENT	POOL REINSURANCE CO. LTD.	RANGER LLOYD'S	SECURITY CONNECTICUT LIFE INS
ONEBEACON INSURANCE COMPANY	POTOMAC INS CO OF ILLINOIS	REALM NATIONAL INSURANCE CO	SECURITY INSURANCE COMPANY OF
ONEBEACON INSURANCE GROUP	PRAETORIAN INSURANCE COMPANY	RED SHIELD INSURANCE COMPANY	SECURITY LIFE INSURANCE CO.
ONEBEACON MIDWEST INSURANCE CO	PRAETORIAN SPECIALTY INSURANCE	REDLAND INSURANCE CO	SECURITY MUT.LIFE INS.CO.OF NY
ONEBEACON PROFESSIONAL INS INC	PREFERRED EMPLOYERS INS CO	REDWOOD FIRE & CASUALTY IN.CO.	SECURITY NATIONAL INSURANCE CO
OSPREY SPECIAL RISKS	PREMERA BLUE CROSS	REGAL INSURANCE COMPANY	SEGUROS ATLAS, S.A.
OUTDOORS INSURANCE COM. INC	PRESBYTERIAN HEALTH PLAN, INC.	RELIANCE STANDARD LIFE INS CO	SEGUROS CATATUMBO c/oQUORUM CA
OWNERS INSURANCE COMPANY	PRICE FORBES LIMITED	RELIANTAR LIFE INS. CO.	SEGUROS COLPATRIA SA
OXFORD HEALTH PLANS (CT) INC.	PRINCETON EX& SURPLUS LINES CO	RELIASTAR LIFE INSURANCE CO	SEGUROS COMMERCIAL AMERICA
OXFORD INSURANCE SERVICES LTD	PRINCIPAL LIFE INS CO	RENAISSANCE LIFE & HEALTH INS	SEGUROS INBURSA S.A. GRUPO
P. BRUNET ASSURANCE INC.	PRIVATE CLIENT GROUP, A	RENFREW INSURANCE BROKERS LTD.	SEGUROS LA COMMERCIAL SA
PACIFIC EMPLOYERS INS	PROASSURANCE (SIGNATURE HEALTH	REPUBLIC INDEMNITY CO OF (CA)	SEGUROS MONTERREY AETNA
PACIFIC INDEMNITY COMPANY	PROASSURANCE INDEMNITY CO INC	REPUBLIC INSURANCE COMPANY	SEGUROS TRIPLE-S INC
PACIFIC INSURANCE CO, LTD	PROASSURANCE SPECIALTY INS	REPUBLIC VANGUARD INS. CO.	SEGUROS Y FIANZAS
PACIFIC INSURANCE COMPANY LTD.	PROCENTURY INSURANCE COMPANY	RETAILERS CASUALTY INS. CO.	SELECT INSURANCE COMPANY
PACIFIC MUTUAL MARINE OFFICE	PROCTOR FINANCIAL, INC.	RETIRED DIRECTORS ASSURANCE	SELECTIVE INS. CO. OF NEW YORK
PACIFIC SPEC INS CO*PersLines	PROFESSIONAL BENEFIT	REUBEN WARNER ASSOCIATES, INC.	SELECTIVE INSURANCE CO OF AMER
PACIFIC WHOLESALE INS BROKER	PROFESSIONAL GOVERNMENTAL	RFIB GROUP LIMITED	SELECTIVE INSURANCE CO OF SE
PACIFICARE LIFE AND HEALTH INS	PROFESSIONAL INDEMNITY AGENCY	RISK INNOVATIONS, LLC	SENECA INSURANCE COMPANY
PACIFICARE LIFE INSURANCE CO	PROFESSIONAL LIABILITY INS INC	RISK SPECIALIST COMPANY	SENECA SPECIALTY INSURANCE CO
PACIFICARE OF CALIFORNIA	PROFESSIONAL LIABILITY INS.	RISK SPECIALISTS CO INS AGENCY	SENTINEL INSURANCE COMPANY LTD
PACIFICARE OF TEXAS INC	PROFESSIONAL LINES	RIVERPORT INSURANCE COMPANY	SENTRY CASUALTY COMPANY
PACIFICSOURCE HEALTH PLANS	PROFESSIONAL UNDERWRITERS		SENTRY INSURANCE CO.

AVAILABLE CARRIERS (CONT.)

Name
SENTRY INSURANCE GROUP
SENTRY INSURANCE MUTUAL CO.
SENTRY SELECT INSURANCE CO.
SERVICE FEE ONLY
SERVICE LLOYDS INSURANCE CO
SES INS BROKERAGE SERVICES INC
SFB ASSOCIATES
SHAREBRIDGE
SHEFFIELD INSURANCE CORP.
SHELLY, MIDDLEBROOKS & O'LEARY
SHELTER REINSURANCE COMPANY
SHENANDOAH LIFE INS. CO.
SIA INSURANCE CO (RPG) LTD
SIA INSURANCE COMPANY
SIERRA HEALTH & LIFE
SILVER OAK CASUALTY, INC.
SIRIUS AMERICA INSURANCE CO.
SJA AGENCY LLC
SKADEFORSIKRING AB
SKYSURANCE
SMITH,BELL & THOMPSON, INC.
SOCIETE NATIONAL D'ASSURANCES
SOCIUS INSURANCE SERVICES
SOLEN VERSICHERUNGEN AG
SOMPO JAPAN INSURANCE CO. OF
SOUTH AND WESTERN GENERAL
SOUTHERN COUNTY MUTUAL INS CO
SOUTHERN CROSS UNDERWRITERS
SOUTHERN HOSPITALITY
SOUTHERN INSURANCE COMPANY
SOUTHERN MARINE AVIATION
SOUTHERN SELECT INSURANCE CO
SOUTHERN STATES INS. EXCHANGE
SOUTHWEST MARINE AND GENERAL
SOUTHWEST RISK LP
SOVEREIGN GENERAL INS CO
SPARTA INSURANCE COMPANY
SPECIAL CONTINGENCY RISKS LTD
SPECIAL MARKETS INSURANCE
SPECIALTY SURPLUS INS CO
SPECTERA INSURANCE CO
SPIRIT INSURANCE COMPANY
ST PAUL MERCURY INSURANCE CO
ST PAUL SURPLUS LINES INS. CO.
ST. PAUL FIRE & CASUALTY
ST. PAUL FIRE & MARINE
ST. PAUL GUARDIAN INS. CO.
ST. PAUL INDEMNITY COMPANY
ST. PAUL INS. CO. OF ILLINOIS
ST. PAUL INS. CO. OF LA
ST. PAUL INSURANCE COMPANY
ST. PAUL PROTECTIVE INS. CO.
ST. PAUL SEAHORSE
STANDARD FIRE INSURANCE CO
STANDARD INSURANCE COMPANY
STANDARD SECURITY LIFE INS.
STAR INSURANCE COMPANY
STARNET INSURANCE CO.
STARNET INSURANCE COMPANY
STARR AVIATION AGENCY, INC.
STARR EXCESS LIABILITY INS LTD
STARR INDEMNITY & LIABILITY CO
STARR INS & REINSURANCE LTD
STARR INTERNATIONAL USA INC.
STARR MARINE AGENCY

Name
STARR MARINE AGENCY INC.
STARR SPECIALTY LINES INS
STARR SURPLUS LINES INS CO
Starr Technical Risks (New 06)
STATE & COUNTY MUTUAL FIRE INS
STATE COMPENSATION INS FUND
STATE COMPENSATION INS. FUND
STATE FARM MUTUAL AUTOMOBILE
STATE NATIONAL INS. CO, INC.
STATEWIDE BONDING COMPANY INC.
STEADFAST INSURANCE COMPANY
STEAMSHIP MUTUAL U/W ASSOC LTD
STERLING & STERLING INC.
STEWART SMITH SOUTHEAST, INC.
STOCKTON INSURANCE CO
STONINGTON INSURANCE COMPANY
STOP LOSS INS SERVICES INC
STRATEGIC COMP INC
STRATEGIC RISK SOLUTIONS
STRATEGIC RISK SOLUTIONS LTD
STRICKLAND GENERAL AGENCY, INC
SUL AMERICA CIA NACIONAL
SUMITOMO FIRE & MARINE/AMERICA
SUMMIT AMERICA INS SERVICES
SUMMIT CONSULTING INC
SUNLIFE ASSURANCE CO OF CANADA
SUNSHINE STATE INSURANCE CO
SUNZ INSURANCE COMPANY
SUPERIOR UNDERWRITERS,A
SURETEC INSURANCE COMPANY
SWETT & CRAWFORD
SWETT & CRAWFORD CO
SWETT & CRAWFORD GROUP
SWETT & CRAWFORD OF TEXAS, INC
SWETT & CRAWFORD TX
SWISS RE INTERNATIONAL SE
SWISS REINSURANCE AMERICA CORP
SWISS REINSURANCE COMPANY
SYMETRA LIFE INSURANCE CO.
SYNAPSE INC.
TALBOT UNDERWRITING SERVICES
TAPCO UNDERWRITERS INC
TARGET INSURANCE SERVICES
TAS INSURANCE GROUP INC.
TECHNOLOGY INSURANCE COMPANY
TEJAS AMERICAN GENERAL AGENCY
TERRA NOVA HOUSE
TEXAS AGA INC.
TEXAS ASSOCIATED UNDERWRITERS
TEXAS COUNTY MUTUAL INS. CO.
TEXAS MUTUAL INSURANCE CO (DB)
TEXAS PACIFIC INDEMNITY CO.
TEXAS SPECIALTY RISK PROGRAMS
THAMES BATRE' MATTEI BEVILLE
THE ALLEN J FLOOD COMPANIES IN
THE AMERICAN WORKER PLANS INC.
THE ARGOS GROUP
THE ASSOCIATION OF OREGON
THE AUTOMOBILE INS CO OF HARTF
THE BEACON INSURANCE COMPANY
THE BEACON MUTUAL INS CO
THE BELL AGENCY INC.
THE BROKERAGE STORE
THE BUCKEYE UNION INSURANCE CO
THE CHESAPEAKE LIFE INS (TX)

Name
THE COMBINED GROUP
THE GOVERNMENTAL INSURANCE
THE HAND-IN-HAND MUTUAL
THE HARTFORD - LIVESTOCK DEPT
THE HARTFORD INSURANCE COMPANY
THE INSCO/DICO GROUP
THE INSURANCE CENTER
THE INSURANCE PROFESSIONALS
THE LEAGUE OF OREGON CITIES
THE MAHONEY GROUP
THE NORTHERN ASSURANCE CO. OF
THE PHOENIX INSURANCE COMPANY
THE STEAMSHIP MUTUAL UND ASSN
THE TRAVELERS COMPANIES
THE TRAVELERS INS. COMPANY
THE UNITED KINGDOM MUTUAL
THE WESTWOOD GROUP
THOMAS MCGEE, LC
THOMAS MILLER & COMPANY
THOMCO
THOMPSON HEATH & BOND LIMITED
THREADNEEDLE INSURANCE CO LTD
THROUGH TRANSPORT MUTUAL INS.
TIG INSURANCE COMPANY
TIP NATIONAL
TOKIO MARINE & NICHIDO FIRE
TOKIO MARINE EUROPE INS. LTD.
TOPA INSURANCE COMPANY
TORUS INSURANCE (BERMUDA) LTD
TORUS INSURANCE (UK) LIMITED
TORUS NATIONAL INSURANCE CO
TORUS SPECIALTY INSURANCE CO
TORUS US SERVICES INC.
TOWER GROUP COMPANIES
TOWER INS COMPANY OF NEW YORK
TOWER NATIONAL INSURANCE CO.
TOWERSTONE, INC.
TRADERS & PACIFIC INS. CO
TRAFALGAR MARINE INS. SERVICES
TRANSAMERICA LIFE INS. CO.
TRANSGUARD GENERAL AGENCY, INC
TRANSGUARD INS CO OF AMERICA
TRANSPAC MANAGERS, INC.
TRANSPORTATION COVERAGE
TRANSPORTATION INSURANCE CO
TRANSPORTATION INSURANCE CO.
TRANSPORTATION INSURORS INC
TravCO INSURANCE COMPANY
TRAVELERS AUTO INS. CO. OF NJ
TRAVELERS BOND DEPT.
TRAVELERS CAS & SURETY CO/AM
TRAVELERS CAS & SURETY OF AMER
TRAVELERS CASUALTY CO OF CT
TRAVELERS CASUALTY INS. CO. OF
TRAVELERS COMMERCIAL CASUALTY
TRAVELERS COMMERCIAL INS. CO.
TRAVELERS EXCESS & SURPLUS
TRAVELERS FLOOD INS. PROGRAM
TRAVELERS GUARANTEE COMPANY
TRAVELERS HOME & MARINE
TRAVELERS IND CO. OF AMERICA
TRAVELERS INDEMNITY CO
TRAVELERS INDEMNITY CO OF CT
TRAVELERS INSURANCE CO LIMITED
TRAVELERS LLOYDS INS. COMPANY

Name
TRAVELERS PROPERTY CASUALTY
TRAVELERS PROPERTY CASUALTY CO
TRAVIS PEDERSEN & ASSOC. INC
TRI-ARC FINANCIAL SERVICES, INC
TRIDENT MARINE MANAGERS
TRINITY RISK, LLC
TRI-STATE INS. CO.OF MINNESOTA
TRUCK INSURANCE EXCHANGE
TRUMBULL INSURANCE COMPANY
TRUST ALGERIA INS.& REINS. CO.
TRUST INSURANCE COMPANY -LIBYA
TRUST INT'L INS CO EC(BAHRAIN)
TRUST RE INTERNATIONAL INS &
TRUSTMARK INSURANCE COMPANY
TRYTON INSURANCE GROUP
TT CLUB MUTUAL INSURANCE LTD
TUDOR INSURANCE COMPANY
TUFTS HEALTH PLAN
TWIN CITY FIRE INSURANCE CO.
U S AVIATION UNDERWRITERS
U S SPECIALTY INSURANCE CO
U.S. RISK INSURANCE GROUP
U.S. RISK UNDERWRITERS, INC.
U.S.RISK FINANCIAL SERVICES
ULLICO CASUALTY COMPANY
UND AT LLOYDS/CERTAIN OTHER CO
UNDERWRITERS AT LLOYDS, LONDON
UNDERWRITER'S INDEMNITY
UNDERWRITERS INSURANCE CO. LTD
UNDERWRITERS MARINE SERVICE
UNICARE LIFE & HEALTH INS. CO.
UNIGARD INSURANCE COMPANY
UNIMERICA INSURANCE COMPANY
UNION AMERICA INSURANCE CO LTD
UNION CENTRAL LIFE INS CO
UNION INSURANCE COMPANY
UNION SECURITY INSURANCE CO.
UNION STANDARD INSURANCE CO.
UNITED AMERICAN INSURANCE CO
UNITED CAPITAL ENVIRONMENTAL
UNITED COASTAL INSURANCE CO
UNITED CONCORDIA INS(BENEFITS)
UNITED EDUCATORS INSURANCE
UNITED FINANCIAL CASUALTY CO
UNITED FIRE & CASUALTY
UNITED HEALTHCARE INS. CO.
UNITED INSURANCE COMPANY LTD
UNITED NATIONAL INS. CO.
UNITED OF OMAHA LIFE INS CORP
UNITED SELF INSURANCE SERVICES
UNITED SHORTLINE INSURANCE
UNITED SPECIALTY INSURANCE CO
UNITED STATES FID. & GUAR. CO.
UNITED STATES FIDELITY &
UNITED STATES FIRE INSURANCE
UNITED STATES LIABILITY INS
UNITED STATES LIABILITY INS CO
UNITED STATES LIABILITY INS.
UNITED STATES SURETY COMPANY
UNITED WISCONSIN LIFE INS CO
UNIVERSAL INSURANCE COMPANY
UNUM LIFE INS. CO OF AMERICA
US ASSURE
US ASSURE INS. SERVICES INC.
US FINANCIAL LIFE INS. CO.

AVAILABLE CARRIERS (CONT.)

Name
US RISK BROKERS INC.
US SPECIALTY UNDERWRITERS INC
USA INSURANCE SERVICES, INC
USG INSURANCE SERVICES INC.
VALIANT INSURANCE COMPANY
VALLEY FORGE INSURANCE BROKERA
VALLEY FORGE INSURANCE COMPANY
VALLEY FORGE LIFE
VANLINER INSURANCE COMPANY
VCW, INC.
VENTURE INSURANCE PROGRAMS INC
VERA CRUZ SEGURADOR, S.A.
VERLAN FIRE INSURANCE COMPANY
VESTA LLOYD'S INS. CO.
VICTOR O SCHINNERER & CO INC
VIGILANT INSURANCE COMPANY
VIKING BOND SERVICE
VIRGINIA SURETY COMPANY, INC.
VIRTUAL MGU, INC.
VISION SERVICE PLAN
VISTA INS.PARTNERS OF ILLINOIS
VOYAGER INDEMNITY INS. COMPANY
W F T INSURANCE SERVICES LTD
W R BERKLEY INS. (EUROPE) LTD
W. BROWN & ASSOCIATES INS.SVCS
W. H. BROWNYARD CORPORATION
WASHINGTON INT'L INSURANCE CO
WAUSAU BUSINESS INSURANCE CO.
WAUSAU GENERAL INSURANCE CO
WAUSAU GENERAL INSURANCE CO.
WAUSAU INSURANCE
WAUSAU UNDERWRITERS INS CO
WAXMAN, CAVNER & OLIVER
WELLINGTON SPECIALTY INS CO.
WELLS FARGO INS. SERVICES NW
WESCO INSURANCE COMPANY
WEST AMERICAN INSURANE CO
WEST BEND MUTUAL INSURANCE CO.
WEST COAST LIFE INS CO.
WESTCHESTER FIRE INS CO
WESTCHESTER SURPLUS LINES
WESTERN HERITAGE INSURANCE CO.
WESTERN MARINE INS. SVCS CORP.
WESTERN NATIONAL ASSURANCE CO
WESTERN NATIONAL MUTUAL GROUP
WESTERN NATIONAL MUTUAL INS CO
WESTERN SECURITY SURPLUS
WESTERN SURETY COMPANY
WESTERN WORLD INSURANCE CO,INC
WESTFIELD INSURANCE COMPANY
WESTPORT INSURANCE CO
WESTPORT INSURANCE CORP
WESTROPE & ASSOCIATES
WFT INCORPORATED
WILLIS - CANADA
WILLIS (BERMUDA) LIMITED
WILLIS AS
WILLIS CORROON CORPORATION
Willis Limited (New Orleans)
WILLIS OF ALABAMA
WILLIS OF DELAWARE INC.
WILLIS OF ILLINOIS, INC.
WILLIS OF ILLINOIS/HPP ALEMBIC
WILLIS OF NEW HAMPSHIRE
WILSHIRE INSURANCE COMPANY

Name
WILSHIRE NATIONAL INS AGENCY
WIND RIVER REINSURANCE COMPANY
WINDSOR INS. CO.
WM. H. MCGEE & CO., INC.
WNC FIRST INS SERVICES (FLOOD)
WOODUS K. HUMPHREY & CO., INC.
WORKCARE SOUTHEAST INC
WORKERS FIRST COMP FUND
WORLD WIDE FACILITIES, INC.
WORLDWIDE FACILITIES INC.
WSIB MOTORSPORTS INSURANCE
XL ENVIRONMENTAL, INC.
XL EUROPE LIMITED
XL INSURANCE AMERICA, INC.
XL INSURANCE CO LTD
XL INSURANCE GROUP
XL INSURANCE SWITZERLAND LTD
XL LLOYDS INSURANCE CO
XL MARINE AND OFFSHORE ENERGY
XL SPECIALTY INSURANCE CO.
XL SPECIALTY INSURANCE COM
YORK
YORK ALLIANCE INS. BROKERS INC
YORK S/A CORRECTAGENS
ZE/USI INSURANCE SERVICES
ZENITH INSURANCE COMPANY
ZNAT INSURANCE CO
ZURICH AMERICAN INS CO OF IL
ZURICH AMERICAN INSURANCE CO.
ZURICH ARGENTINA COMPANIA DE
ZURICH AUSTRALIAN INS LIMITED
ZURICH INS CO (BERMUDA BRANCH)
ZURICH INSURANCE CO LIMITED
ZURICH INSURANCE PUBLIC
ZURICH NORTH AMERICA
ZURICH RE U.K.
ZURICH SPECIALTIES LONDON LTD

5. Provide information documenting your brokerage firm's ability to assist the County in proving and resolving difficult claims with insurers.

Through long-established contacts with major markets and experience in handling some of the industry's most complex claims, we can overcome obstacles that inevitably arise in the event of a claim. Our goal is to ensure that those obstacles do not result in reduced or delayed claim settlements to our clients. We work hard to settle claims expeditiously, with the insured's best interests, business policies and public relations in mind.

The McGriff/Hagan offices are invested in providing excellent claim service to our clients. The McGriff Houston claims department is staffed with over 25 employees whose sole job is to push claims to resolution for our clients. Additionally, Hagan Risk Partners is available locally to assess/help with claim management at a moment's notice. Our combined claim department experience consists of former carrier insurance company adjusters, supervisors/managers, independent adjusters, in-house risk management department claim and litigation managers, loss control technicians and attorneys. These individuals have been involved in some of the most complex and high-profile claims.

McGriff Houston serves 65+ Public Entities that sustained Hurricane Harvey damage/insurance claims. We are proud to admit that we still provide Risk Management/Insurance services to these Public Entities that sustained Hurricane Harvey damage. We attribute this to our claim department's ability to push claim adjusters to claim resolution as quickly as possible and our ability to deploy the necessary resources that our clients need when it matters the most.

Success Story: Hurricane Harvey Recovery – Humble ISD, Kingwood, TX

On the days surrounding August 25, 2017, Category 4 Hurricane Harvey inundated the Texas Gulf Coast with over 50 inches of rain during a four-day period, causing historic flooding that severely impacted many local communities, including one of the largest school districts in Texas, Humble Independent School District (HISD). Forty of HISD's 43 campuses sustained damage from the storm, resulting in a loss in excess of \$100M, with approximately 2,700 students displaced from HISD's most heavily damaged campus, Kingwood High School (KHS), a 600,000 square foot high school that was under five feet of water for up to a week.

McGriff acted immediately, working closely with DRS disaster recovery consultants to coordinate insurance carrier representatives, NFIP adjusters, FEMA representatives, and restoration contractors to facilitate both financial and physical recovery. A strategy was quickly developed to optimize financial recovery between all available funding sources (Property Insurance, NFIP, FEMA, and available grants) that resulted in over \$30M received within the first 3 months of the catastrophe. Our client was also the first local government to receive reimbursement funds from FEMA, including the first to receive an obligation of \$56M for permanent repairs.

Our team also developed a physical recovery strategy that coordinated a wide range of resources, including FEMA/insurance recovery experts, estimators, and project managers, among others, to accelerate the repairs to Kingwood High School. This successful recovery strategy resulted in 6,000 displaced students returning to their High School on Spring Break, less than seven months after the loss, which far exceeded initial recovery expectations of 12-18 months. The return to Kingwood HS ended the 40-mile round-trip daily commute for students and teachers to a shared campus and enabled KHS seniors to graduate from their own school. The recovery team was also successful in obtaining approval from FEMA to fund the building of brand-new Agricultural Barns at a new location.

Our efforts were instrumental in turning this Hurricane Harvey nightmare into a success story for the district through our ability to view the full recovery picture and our strong industry relationships that allowed us to bring in the qualified resources necessary to meet the district’s financial and physical recovery needs.



Harvey Flooding at Kingwood High School



Restored Kingwood High School Campus

Claims Services

The importance of claims management to the insurance process can never be overstated. The response of an insurance carrier and its product to a claim situation reveals what the insurance buyer has purchased. Throughout the claims process, your entire McGriff/Hagan team is actively involved in discussions with your loss adjusters, insurers and legal representatives.

The following outlines the typical responsibilities for McGriff/Hagan claims professionals:

Pre-Renewal	Year Round	After a Claim
<ul style="list-style-type: none">• Review insurance program with account executive• Establish claim-handling procedures for the carriers• Assist with internal claims procedures and reporting requirements• Develop and implement specific claim strategies	<ul style="list-style-type: none">• Facilitate and attend claim review sessions• Perform claim audits• Review, analyze and discuss large claims• Provide customized executive summaries, management reports, flow charts and open item lists covering claim activities• Participate in loss adjustment meetings	<ul style="list-style-type: none">• Advocate for the client, dispute resolution with claims adjusters• Liaise with adjusters, underwriters, attorneys and client staff• Expedite partial payments, make recommendations on settlements, and monitor reserves• Respond to reservation of rights letters and coverage denials• Continually track identified claims and monitor dates for full settlement

McGriff employs a full-time claims staff dedicated to facilitating claims for our clients. In addition, a dedicated Claims Account Executive is permanently assigned to each client's account. We believe that the performance of adjusters and claims personnel significantly influences the ultimate cost of a loss. By aggressively supervising the activities of adjusters and claims personnel, the quality of service and loss reserving can be improved. Frank DeLeon & Angie Eckhardt will be Brazoria County's dedicated Claim Account Executive.

6. Provide a statement of whether the brokerage firm will agree to disclose all compensation it receives as a result of contracts placed on behalf of the County and, if not, an explanation of why it will not provide such information.

McGriff/Hagan is 100% transparent about the compensation received for our services.

7. Indicate whether the brokerage firm provides full risk identification and analysis as part of the broker's normal contracted services.

McGriff/Hagan has a fully staffed Loss Control/Risk Identification Department and Risk Analytics/Analysis Department. These services will be extended to Brazoria County at no additional cost. These services will be further illustrated in response to question 9.

8. Describe what the brokerage firm will do to ensure that proper attention will be given to the County's account now and as its book of business grows.

Our service team for Brazoria County is 100% local within the Greater Houston area or within Brazoria County. We are accessible to you day or night, weekends and holidays. Due to our local presence, we are best suited to identify new risks and exposures associated with County operations and programs.

As County residents, we are highly motivated to protect County assets, address exposures and provide outstanding service. Failure to adequately perform for Brazoria County creates a substantial reputational risk for our team.

Our Claims Response time will continue to be second to none, and we are able to attend any last-minute or impromptu meetings, claim reviews, site visits, and other urgent matters on short notice.

In addition to our local presence, we serve the needs of several Texas Counties and local governments daily, and it is our team's sole focus. We attribute our success to a "Client Centric" service model and our technical ability.

9. Describe any and all products offered that are unique to the firm such as risk management information systems, loss control programs, actuarial services, etc. Provide a brief description of Proposer's firm, and the scope and nature of services routinely provided by Proposer. Demonstrate the ability to perform the required services as described in this RFP. Indicate Proposer's understanding of the purpose and scope of the proposed services as evidenced by the quality of the proposal submitted. Identify the type of business (corporation, partnership, sole proprietor, etc.) under which Proposer's firm operates, the date the business started, and the license number to do business in the State of Texas.

McGriff/Hagan are an Insurance/Risk Management brokerage firms that specialize in providing Risk Management services to Texas Public Entities. We believe Brazoria County will recognize our ability to perform the required services as described in the RFP. We understand the purpose and the scope of the proposed services outlined and are committed and qualified to provide said services to Brazoria County.

McGriff/MMA operates as a Limited Liability Company (LLC). The business was founded in 1922. McGriff/MMA is duly licensed to conduct business in the State of Texas under the following license numbers: Life, Accident, Health & HMO,

Property and Casualty; Texas Department of Insurance; License No. 13814 (issued 4/11/2002, expires 10/20/2026) and Surplus Lines Agency; Texas Department of Insurance; License No. 19026 (issued 10/20/2004, expires 10/20/2026).

We view our services as four quadrants of equal importance below.



Loss Control

McGriff/MMA can assist with designing and implementing a customized safety and loss prevention plan that significantly reduces the frequency and severity of injuries.

- Risk Control Assistance and Training
- On-Site Services
- Emergency Response/Disaster Management
- Safety Training Program Development & Maintenance
- Claims Analysis
- Coordination w/ Insurers
- Documentation
- Property Risk Control Services
- Transportation Exposures
- Fleet safety program evaluation



Data & Analytics

Our analytics team provides needed technical support to enable our clients to make more informed financial decisions. Some examples of these services include:

- Casualty Analytics
- Loss Stratification & Analysis
- Loss Projection
- Collateral Analysis and Negotiation
- Total Cost of Risk (TCOR) Analysis
- Experience Modifier Rating Verification
- Property Analytics & Benchmarking
- Catastrophe (CAT) Modeling
- Historical Catastrophe Event Analysis
- Natural Hazard Mapping and Reporting
- Building Valuation Services



Claims Management

Our goal is to ensure that obstacles do not result in reduced or delayed claim settlements to our clients.

- Claims Services
- Tracking All Claims
- Advocating for Clients
- Accessing Legal Resources
- Maintaining a Suit Log
- Providing Flow Charts for Complex Claims
- Annual File Audits
- Quarterly Claims Reviews



Daily Service and Assistance

Service is the essence of what we do and is truly our main differentiator from our competitors.

- Open Items and Stewardship/Strategy Meetings
- Audit services for Legacy Billings and Premium Adjustments
- Budgeting / Cost Allocation Assistance
- Certificates of Insurance and Auto ID cards
- Exposure Schedule Management
- Benchmarking (TCOR, Limits, etc.)
- RMIS Assistance (document storage, analytics, etc.)

RFP #26-09 Insurance Brokerage Services for Brazoria County

McGriff has developed a quantitative analytics practice headed by Tom Bradt to support Texas Public Entities. Our analytics team provides the necessary technical support for complex mathematical and statistical modeling, enabling Brazoria County to make more informed financial decisions. Some examples of these services include:

Loss Stratification and Analysis

Determine an optimal range of deductibles that will provide the best premium consideration while shielding Brazoria County from absorbing an inordinate amount of risk.

Loss Projection

Projection of the expected losses for the upcoming year within the deductible/retention for each line. This will assist Brazoria County in accruing for probable losses and is used in collateral calculations.

Collateral Analysis and Negotiation

Verify that the current carrier's collateral requirement is reasonable and contest as necessary. Assist with legacy collateral wind-down to ensure an expedient return of outstanding collateral.

Program Testing and Optimization / Projected Cost of Risk

McGriff incorporates the loss stratification results into our marketing efforts to guide the underwriters to the optimum program structure and pricing. The loss picks are incorporated into the various quotes to determine the optimal projected cost of risk for the upcoming policy period.

Customized Reports

We can create reports to help Brazoria County track insurance costs, such as Cost of Risk reports (total cost of risk by policy year) and loss allocation by location/division (dependent upon data availability in the loss runs). We have included some sample reports for your reference in Appendix A.

Catastrophe Risk Assessment Reports

We can produce reports that will indicate the severity of the perils according to a set of assumptions that are set within the simulation. These reports will help Brazoria County make more informed decisions on Catastrophe limits and deductibles.

Please refer to Appendix A for Sample Analytic Charts.

Loss Prevention Services

McGriff/Hagan are committed to helping you avoid costly claims through state-of-the-art loss control programs and has a myriad of services available. We can assist with designing, implementing or enhancing a customized safety and loss control program that significantly reduces the frequency and severity of injury. Our professionals will help you assess the effectiveness of your existing programs and procedures, and provide specific recommendations for improvements. We work with your staff to help them recognize problems and develop solutions before a loss occurs. By becoming involved in these programs, our goal is to provide the groundwork necessary for prevention.

Our approach to risk control service focuses on the specific needs of our clients' organizations. By listening to you and learning about your operations, we can design and implement a customized safety and loss prevention program that will significantly reduce the frequency and severity of injuries. We begin by determining what is currently working well for you and identifying issues your leadership team feels are important for long-term sustainable objectives. We also act as the coordinator of all insurance carrier loss prevention and/or control services and unbundled vendor contracts to ensure promised services are delivered.

McGriff/Hagan strongly believes that safety engineering and claims management should not be viewed as separate functions. Analysis of claims data can provide a roadmap for concentrating loss control efforts that will derive the greatest results.

Our team of loss control professionals averages over 21 years of experience in property protection, safety and loss prevention, workers' compensation, and liability in a broad range of industries.

Some specific loss control services are:

- Construction Risk Management Services
- Property Loss/Risk Control
- Coordination with Insurers
- Rapid Response for Loss Situations
- Safety Training
- On-Site Services
- Emergency Response/Disaster Management
- Claims Analysis

McGriff's Loss Control Services:

- Safety programs; training modules and manuals
- Analyses of losses by:
 - Job site
 - Accident
 - Type of injury
 - Exposure
- Monitoring for compliance w/procedures and insurer requirements
- Documenting loss situations to facilitate the claims' process
- 24/7 availability

Rapid Response for Loss Situations

McGriff/Hagan loss control professionals are available on a 24/7 basis and can respond immediately in the event of a significant loss. We normally arrive before the adjuster and begin taking pictures and gathering information immediately to assist with prompt claim processing. This quick response assists you and your insurer with defining requirements to bring the loss to a rapid and satisfactory conclusion.

10. References: Provide three (3) client references (governmental entities preferred) that will document prior experience that demonstrates the Respondent’s ability to perform all required services outlined in this RFP. Include the customer name, address, business type of governmental entity, contact name, telephone, email address, contract period and services provided.

Fort Bend County	
Address	301 Jackson St, Richmond, TX 77469
Business Type	Texas County
Contact Name	Wyatt Scott
Role	Risk Manager
Telephone	281-341-4493
Email Address	Wyatt.scott@fortbendcountytexas.gov
Contract Period	McGriff has served Fort Bend County for 10+ years.
Services Provided:	Placement/service of all Property & Casualty lines of insurance purchased. In-house risk management, loss prevention, and FEMA support.

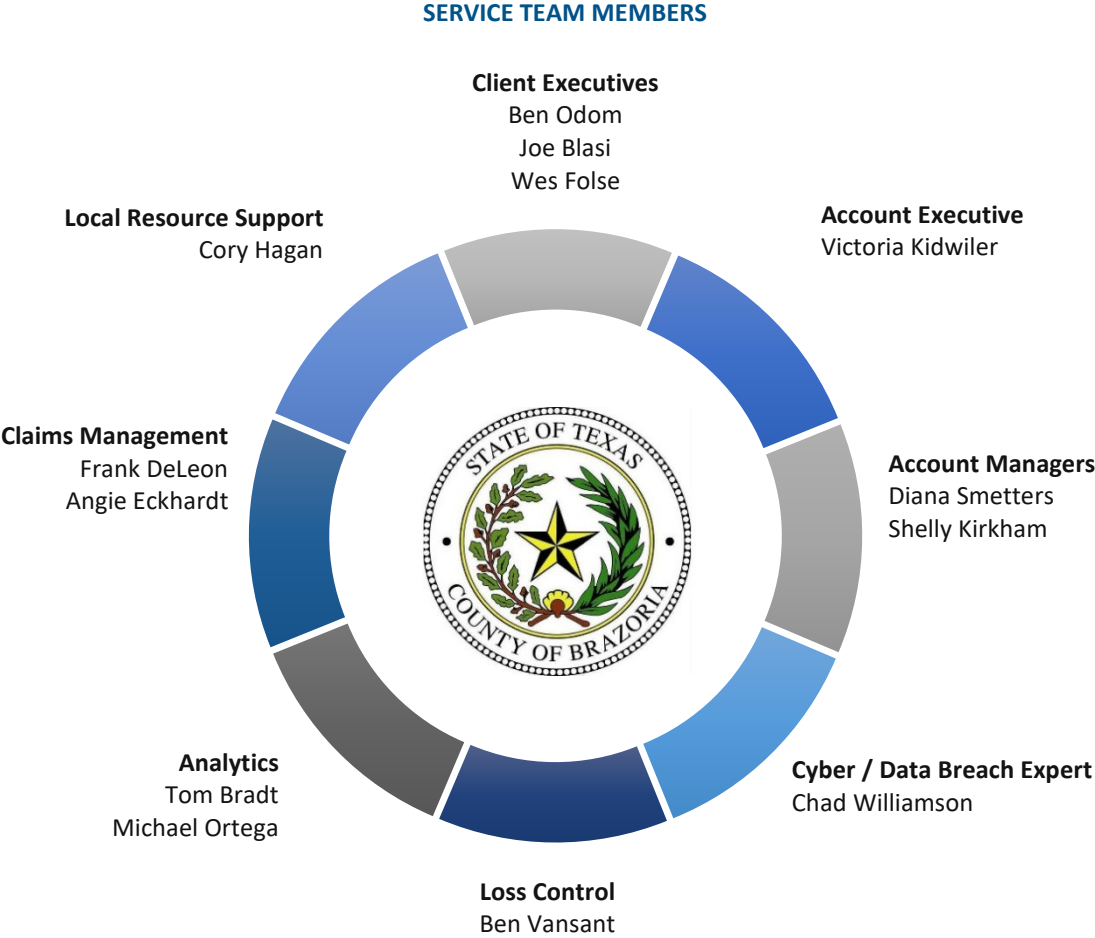
Travis County	
Address	700 Lavaca Street, Austin, TX 78701
Business Type	Texas County
Contact Name	James Alvarez
Role	Risk Manager
Telephone	512-550-7916
Email Address	James.Alvarez@traviscountytexas.gov
Contract Period	McGriff has served Travis County for 8+ years.
Services Provided:	Placement/service of all Property & Casualty lines of insurance purchased. In-house risk management, loss prevention, and FEMA support.

Williamson County	
Address	710 S Main, Georgetown, TX 78626
Business Type	Texas County
Contact Name	Andy Hoffman
Role	Risk Manager
Telephone	512-943-1980
Email Address	Andy.Hoffman@wilcotx.gov
Contract Period	McGriff has served Williamson County for 8+ years.
Services Provided:	Placement/service of all Property & Casualty lines of insurance purchased. In-house risk management, loss prevention, and FEMA support.

Jefferson County	
Address	1149 Pearl Street, Beaumont, TX 77701
Business Type	Texas County
Contact Name	Verenice Rosales
Role	Risk Manager
Telephone	409-839-2391
Email Address	Verenice.rosales@jeffersoncountytexas.org
Contract Period	McGriff has served Jefferson County for 25+ years.
Services Provided:	Placement/service of all Property & Casualty lines of insurance purchased. In-house risk management, loss prevention, and FEMA support.

Tab 2 Brokerage Team

Provide an organizational chart showing the level of organizational responsibility and the services provided by each of the members of your firm's proposed service team.



Please refer to Appendix B for team member resumes.

Project Team's Responsibilities

Client Executives & Local Resource Support:

Ben Odom

Joe Blasi

Wes Folsie

Cory Hagan

- Overall client responsibility
- Strategic planning
- Program design
- Marketing coordination
- Market updates
- Supervision/negotiation of major claims

Account Executives:

Victoria Kidwiler

- Technical Service
- Primary Marketing Team
- Contract analysis
- Special projects
- Wording and Policy Analysis

Account Service Representatives:

Diana Smetters

Shelly Kirkham

- General Account Support Services
- Binders & Certificates of Insurance
- Policy documentation
- Open items reporting
- Quarterly report adjustments

Claims Management:

Frank DeLeon

Angie Eckhardt

- Active involvement in the claims management program
- Monitor all reported claims to conclusion
- Participate in claim review sessions
- Coordinate claim services with insurers
- Perform claim audits
- Management of complex claims

Risk Analytics/Actuarial:

Tom Bradt

Michael Ortega

- Loss stratification and analysis
- Loss projections
- Program testing and optimization
- Customized reports as requested

Loss Prevention

Ben Vansant

- Site-specific audits

Cyber / Data Breach Expert

Chad Williamson

- Cyber and Privacy Coverage
- Professional / Errors & Omissions Liability
- Commercial Crime
- Special Crime

Servicing Office Location

McGriff, A Marsh & McLennan Agency LLC Company

10100 Katy Freeway, Suite 400 | Houston, Texas 77043

(800) 877-1449 - (713) 877-8975 - (713) 877-8974 fax, www.mcgriff.com

Team Member	Phone Number	Email
Ben Odom Co - Team Leader	(281) 636-0591	Ben.Odom@MarshMMA.com
Joe Blasi, CPCU, ARM Co - Team Leader	(713) 940-6565	Joseph.Blasi@MarshMMA.com
Wes Folse Client Executive	(713) 402-1458	Wesley.Folse@MarshMMA.com
Cory Hagan Local Service Support	(979) 297-2433	Cory@haganinsurance.com
Victoria Kidwiler Account Executive	(713) 244-7696	Victoria.Kidwiler@MarshMMA.com
Diana Smetters Account Manager – Service Representative	(713) 940-6596	Diana.Smetters@MarshMMA.com
Shelly Kirkham Account Manager – Service Representative	(713) 273-2648	Shelly.Kirkham@MarshMMA.com
Chad Williamson Cyber / Data Breach	(713) 940-6548	Chad.Williamson@MarshMMA.com
Tom Bradt Risk Analytics	(713) 940-6563	Tom.Bradt@MarshMMA.com
Michael Ortega Risk Analytics	(713) 273-2603	Michael.Ortega@MarshMMA.com
Ben Vasant Loss Prevention	(832) 499-5581	Ben.Vasant@MarshMMA.com

24-Hour Claims Contacts

We offer 24/7 claim reporting via 1-800, online, or fax. Once received, our staff reports the claim to the appropriate carrier, creates a follow-up diary, and continues to monitor the claim to its conclusion.

Frank DeLeon Claims Management	(713) 408-8553	Frank.DeLeon@MarshMMA.com
Angie Eckhardt Claims Management	(832) 545-8776	Angie.Eckhardt@MarshMMA.com

Include resumes of those principals, partners and other key service staff members who will be directly involved in the overall brokering and consulting effort.

Resumes of principals, partners, and key service staff members who will be directly involved in the overall brokering and consulting effort are included in **Appendix A** of the proposal.

Tab 3 Innovation and Effectiveness

Describe proposer's understanding, responsiveness and approach to the insurance brokerage and consultative services required. Also include descriptions of:

1. Any broker service innovations proposer is proposing.

As the leading broker provider for large Texas Counties, we truly understand what it takes to effectively service the needs of a large County like Brazoria County. We are confident in our abilities to perform for our clients and are certain Brazoria County will continue to benefit from the enhanced service we provide to the County.

McGriff/Hagan are committed to the use of a Total Cost of Risk approach to assist Brazoria County in achieving reductions in its overall risk management costs. Our "Cost of Risk" approach embodies a consultative methodology that includes critical disciplines, including risk management, risk control, claims management and risk financing; all working together in a collaborative effort to identify, control, and mitigate corporate risks associated with the delivery of internal and external customer services. As an example, our casualty (workers' compensation, general liability and automobile liability) program auditing and review services include the following:

- Validating audited premiums for workers' compensation
- Auditing workers' compensation experience modifiers
- Reviewing/analyzing historical loss data for underwriting purposes and process improvement opportunities
- Analyzing current and historical insurance program collateral requirements
- Benchmarking the comparative industry cost of risk dollars associated with specific lines of insurance
- Performing risk management contractual reviews
- Analyzing and redesigning the internal cost of risk allocation programs

These services focus primarily on the fixed costs and the administrative costs that are included in the overall cost of risk. We also provide services that focus on the variable costs associated with the casualty program. Since losses/claims generally account for approximately 80% of the cost of risk, we have developed consultative methodologies for our Texas Public Entity clients that identify, evaluate and mitigate the cost drivers associated with the variable claims' costs. Those services include the following:

Claims management evaluation services that include claim file audits, third-party administrator performance reviews, contract compliance audits, process improvement reviews and comparative studies for in-house versus outsourced claims management functions. McGriff has developed diagnostic tools used to evaluate third-party claim administrator claim management performance.

Corporate safety/risk control evaluations include an overall review of safety programs and their effectiveness. The areas of focus include program awareness, employee participation, contractor safety, inspections, hazard reporting, hazard control, data analysis, preventative maintenance, emergency action plans and training initiatives. McGriff has developed a diagnostic tool used to audit/review and help evaluate a loss control program. We also assist in the development of training programs, perform incident investigations, develop return to work programs and assist with industrial hygiene services.

Statistical data review and analysis services that are designed to identify loss trends, pinpoint divisional and location performance issues, identify injury trends and determine areas of the operations that need improvement.

Our Risk Data Analytics team provides technical support with complex catastrophe and statistical modeling to enable our clients to make more informed financial decisions. We don't just send a cold submission to the marketplace; we present a completed underwriting file to the underwriters as follows:

Loss Stratification and Analysis

Determine an optimal range of deductibles that will provide the best premium value while shielding the County from absorbing an inordinate amount of risk.

Loss Projection

Projection of the expected losses using state-of-the-art Windstorm Modeling Software (RMS & AIR). This allows underwriters to measure probable loss costs, aggregate capacity and arrive at more competitive outputs.

Program Testing and Optimization / Projected Cost of Risk

We incorporate loss stratification results into our marketing efforts to guide the underwriters to the optimum program structure and pricing. The loss picks are incorporated into the various quotes to determine the optimal projected cost of risk for the upcoming policy period.

Customized Reports

We provide a wide variety of risk modeling and alternative risk services to the County. Simply stated, this function provides a quantitative measurement of the impact of future contingent events. These measurements include the expected value of such events, as well as the volatility associated with the range of potential outcomes. Since the resulting measures are only as good as the underlying data and assumptions

Alternative Risk Transfer Solutions: Parametric Insurance Solutions

Our firm remains on the cutting edge of alternative risk transfer solutions. In recent years, product innovation and data analytics have expanded the scope of commercial insurance solutions to offer coverage for a wider range of threats, exposures and perils. With its transparent and fast claims payment and ability to offer a payout without actual physical damage to an asset, parametric or index-based solutions are often brought to the table of discussion when covering hard-to-insure risks. The key differences between traditional indemnity and parametric insurance relate to the payment trigger, recovery, basis risk, claims process, term and structure. Fundamentally, parametric (or index-based) solutions are a type of insurance that covers the probability of a predefined event happening instead of indemnifying actual loss incurred. It is an agreement to make a payment upon the occurrence of a triggering event, and as such is detached from an underlying physical asset or piece of infrastructure. A suitable parameter or index is any objective measure that is correlated to a specific risk and ultimately to a financial loss for the insured. This is a "measurable index" related to a "scenario". Any parameter or index that is used as the basis for a parametric solution must be objective (i.e. independently verifiable), transparent, and consistent. Generally, we are looking for indices that are easily measurable and reported quickly and effectively to ensure prompt payout. It is important that neither the risk taker nor the insured can influence the event or its reporting to avoid moral hazard. This is why indices around weather and "Acts of God" are so popular in parametric insurance.

Some examples of agencies and respective parameters or indices:

- Singapore National Environmental Agency (NEA) Pollutant Standard Index (PSI)
- Hong Kong Observatory (HKO) typhoon warning signals
- Japan Meteorological Agency (JMA) seismic intensity
- US Geological Survey (USGS) earthquake magnitude
- Australian Bureau of Meteorology (BoM) tropical cyclone category
- Traditional insurance versus parametric/index-based covers – what's the difference?

Often, we are asked about the difference between traditional indemnity-based insurance versus parametric insurance covers.

An important point to drive here is that parametric insurance solutions are not designed to replace but to complement traditional insurance programs. They can fill the protection gaps left by indemnity insurance, like deductibles, excluded perils, scarce capacity or pure financial risks where the insured has no control over the underlying asset – take contingent business interruption, for example.

2. The effectiveness of the proposed broker services and how such effectiveness is measured.

At McGriff/Hagan, we view ourselves as an extension of our clients' Risk Management Department. We believe that to obtain the best overall results for our clients, we must first start with a plan that identifies the County's short-term and long-term Risk Management goals. We remain in frequent contact with our clients to address pending issues, generate current risk data points and establish a long-term strategy. This process of regular communication and information flow allows the County Risk Management Department and our team to track our progress and the effectiveness of our efforts.

In addition, we will also track the overall Total Cost of Risk for the County to quantify the effectiveness of the insurance/risk transfer solution. We conduct a "5-Year TCOR" analysis to determine trends and inefficiencies. These results allow us to identify the most efficient risk transfer thresholds for the County and allow for more informed risk transfer decisions going forward.

3. Any unique services or special expertise your brokerage firm offers that might bring value and/or efficiency to the County.

We firmly believe we will bring more specialization and expertise to Brazoria County than any other provider.

Servicing Brazoria County's Insurance and Risk Management needs must be earned through exceptional service performance. We believe that the firm handling the County's program should provide much broader service than simply delivering an insurance policy. A large organization with limited internal administrative resources must rely heavily on additional support services from its Insurance and Risk Management partners. McGriff/Hagan will provide Brazoria County with services well beyond the other players in the insurance market, such as:

- **Claims Management:** In your greatest time of need, we are on the ground with you, coordinating the entire process with remediation contractors, insurance claims adjusters, and other vendors. Our clients who worked through Harvey recovery will confirm the integral role that we have played since Day 1. Examples of our Harvey performance include The City of Houston, Harris County, Kingwood/Humble ISD, Cy-Fair ISD, Houston Community College and 57 other Texas public entities that sustained storm damage. We don't just report the claim; we actively support your staff and vendors until your claim is concluded.
- **Preferred Adjuster Assignment:** Before the claim occurs, we introduce our clients to a panel of preferred claims adjusters and allow them to choose the one they like. We then negotiate with the insurers to designate Brazoria County's preferred adjuster for any loss. This proactive approach ensures a smooth claims handling process with a reasonable adjuster who is working with us and not against us.
- **Claims Preparation Services:** Large claims can become overwhelming to any large organization. The coordination of contractor estimates, building consultant reviews, engineering reports and the ongoing management of "Open Items" represents a tremendous burden on the Risk Manager, Business Officers and Facilities Department. Our team of Claims Management Specialists manages this process until the conclusion.
- **FEMA Claims Support Services:** Our panel of experienced FEMA Claim Preparation experts specializes in serving non-profit organizations and can absorb much of the workload currently performed by internal Brazoria County staff.

RFP #26-09 Insurance Brokerage Services for Brazoria County

- **Market Clout & Direct Access:** McGriff Houston places far more premium volume for coastal counties than any other firm. Our clients benefit from this premium volume through lower premium rates and broader coverage. Additionally, we are one of the few firms with direct access to key markets. Many of our competitors lack these direct access channels and underwriter clout, which creates inflated costs and poor claims outcomes for Brazoria County.
- **Loss Control:** Loss Control Services, inclusive of safety and loss prevention, are provided in the context of the overall service plan and will be developed with direct input and collaboration with Brazoria County's Risk Management team. McGriff's extensive experience in designing, planning, developing and implementing complex risk management and safety programs will add value to Brazoria County in the prevention of losses.
- **Analytics:** McGriff/Hagan analytical services can help Brazoria County's risk management staff by providing quantitative measurements of the impact of future events. These measurements include the expected value of such events, as well as the volatility associated with the range of potential outcomes.
- **Specialization in Public Entities:** We serve more Public Entities in the Greater Houston area and in the State than any other broker service provider. Brazoria County will benefit from our specialization in Public Entity risk management.

Tab 4 Commission Percentage

The proposal shall set forth a commission percentage fee basis to provide all the Standard Services without collecting commission from any insurance companies.

The fee portion of your proposal must identify any other charges that would, or could, be billed in connection with the insurance brokerage and consulting services to be provided.

We propose an annual service fee of 5% commission, paid to McGriff by the insurance carriers. This fee includes all services mentioned in the RFP.

Brazoria County may, at its own discretion elect to opt out of having the awarded Broker of Record participate in contingent and supplemental commission arrangements with intermediaries and insurance companies that provide additional compensation and or incentives. If your company engages such arrangement, please provide information in Exhibit B Vendor Response.

We will agree not to accept contingency income from carriers if on a commission fee structure with Brazoria County, if this is the request of the County.

Exceptions to Standard Terms and Conditions

McGriff/Hagan has no exceptions to the Standard Terms and Conditions for *Insurance Brokerage Service RFP #26-09*.

Addendums

BRAZORIA COUNTY ADDENDUM NUMBER 1

RFP#26-09 INSURANCE BROKER FOR BRAZORIA COUNTY

PLEASE INCLUDE THIS SIGNED ADDENDUM WITH YOUR SEALED RFP PACKAGE.

This Addendum modifies the RFP#26-09 package as follows:

1. Definitions: All definitions set forth in the Contract shall have the same meaning unless stated otherwise in this Addendum.
2. The following questions have been submitted for clarification:
 - 2.1 Vendor Question: "Who is the current broker for the County?"
Brazoria County Answer: Arthur J. Gallagher
 - 2.2 Vendor Question: "What is the current broker's full compensation including any owned intermediary/wholesale compensation?"
Brazoria County Answer: Brazoria County will not release its current broker compensation schedule.
 - 2.3 Vendor Question: "Should the proposed total compensation, referenced in Tab 4 of the solicitation, of a responding brokerage firm include compensation earned by owned and non-owned intermediaries/wholesalers?"
Brazoria County Answer: Proposed Total Compensation Responses should include all potential sources of compensation from which the Vendor anticipates it will derive compensation if awarded.
 - 2.4 Vendor Question: "Is it required for the responding broker to disclose market access such as intermediary/wholesale markets as well as any ownership of an intermediary/wholesaler in its response to the County's solicitation?"
Brazoria County Answer: Yes.
 - 2.5 Vendor Question: "Can you please provide a current schedule of insurance including limits and retentions?"
Brazoria County Answer:

Policy	Coverage	Ded./Ret.
Aviation Liability	\$2,000,000.00	\$2,500.00
Equipment Breakdown	\$100,000,000.00	\$5,000.00
Consolidated Crime Policy	\$750,000.00	\$7,500.00
Liability Insurance	\$5,000,000.00	\$50,000.00
Flood Policies	Varied	Varied
Museum Liability	\$2,000,000.00	\$10,000.00
Pollution Liability	\$1,000,000.00	\$50,000.00
Commercial Property	\$25,000,000.00	\$100,000 / 5%
TWIA Commercial and Residential	Varied	Varied

3. All other terms and conditions of the RFP are to remain unchanged.

Please refer any questions regarding this RFP to the Brazoria County Purchasing Department at (979) 864-1825 or bidclarifications@brazoriacountytx.gov.

McGriff, A Marsh & McLennan Agency LLC Company

LEGAL NAME OF CONTRACTING COMPANY

(713) 877-8975

TELEPHONE NUMBER


SIGNATURE

(713) 877-8974

FACSIMILE NUMBER

Ben Odom, Senior Vice President
NAME AND TITLE PRINTED

*Addendum approved by:



Susan P. Serrano, CPPO, CPPB
County Purchasing Director

11/12/2025

Date

Litigation, Claims, Reputation and Compliance Form

I. Please answer the following questions

a. Has your firm ever defaulted, been declared to be in default, or failed to complete any work awarded?

_____ Yes

X No

If yes, stipulate where and why: _____

b. Has your firm ever paid (or had withheld from payment) liquidated damages for failure to complete a contract on time?

_____ Yes

X No

If yes, stipulate where and why: _____

c. Has your organization ever been charged with or paid a fine for non-compliance of State and/or Federal statutes or regulations?

_____ Yes

X No

If yes, stipulate where and why: _____

II. List pending claims and/or litigation against or involving project owners at time of submitting Proposal. Show project name, owner and summary explanation.

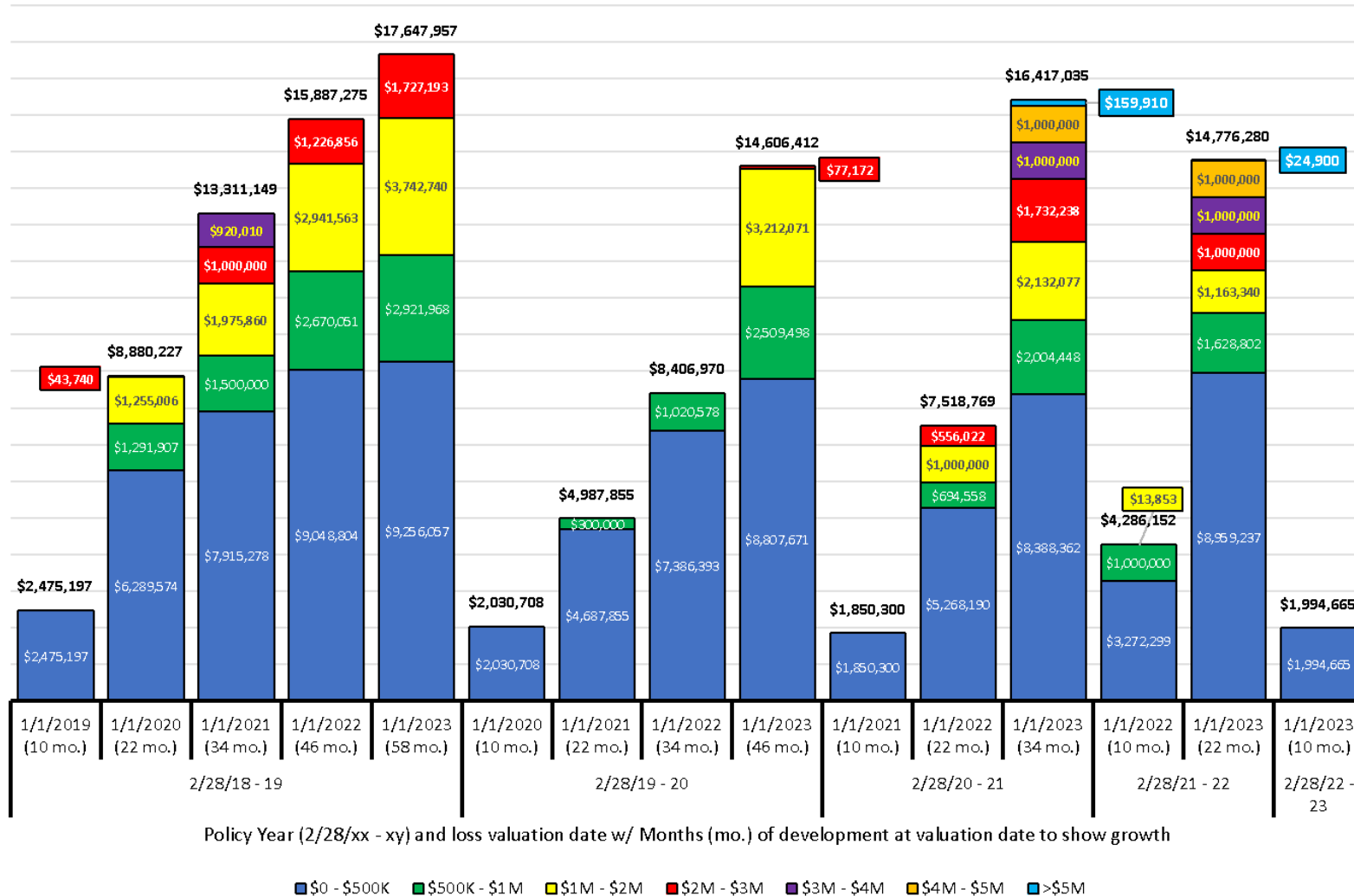
In the ordinary course of business, McGriff may be involved with litigation and other legal proceedings, investigations and inquiries, some of which are conducted on an industry-wide basis. Details regarding certain outstanding legal proceedings pertaining to McGriff, a Marsh & McLennan Agency company, are disclosed in the public Securities and Exchange Commission filings of Marsh & McLennan Companies, Inc., MMA's parent company.



Appendices

Appendix A – Sample Analytics

Sample: Auto Liability Cost Growth Overview
Data: Auto Liability Losses by Policy Year at sequential 1/1/xx valuation dates



Sample's Auto Liability Loss Retention / Transfer Analysis - Cost Analysis (Total from ground up and by layer)

Data: Losses as of 12/22/22 - excludes \$0 Claims

TOTAL Claim Cost		Retention: Loss Limited to...						Transfer: Loss Excess of...					
Policy Year	Total Incurred	\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000	\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000
2/28/16 - 2/28/17	\$15,906,567	\$6,664,795	\$8,903,323	\$11,029,791	\$13,007,833	\$14,007,833	\$15,007,833	\$9,241,773	\$7,003,245	\$4,876,776	\$2,898,734	\$1,898,734	\$898,734
2/28/17 - 2/28/18	\$6,945,814	\$6,019,735	\$6,943,793	\$6,945,814	\$6,945,814	\$6,945,814	\$6,945,814	\$926,019	\$2,021	\$0	\$0	\$0	\$0
2/28/18 - 2/28/19	\$17,672,466	\$9,280,565	\$12,202,534	\$15,945,273	\$17,672,466	\$17,672,466	\$17,672,466	\$8,391,901	\$5,469,932	\$1,727,193	\$0	\$0	\$0
2/28/19 - 2/28/20	\$14,606,232	\$8,807,671	\$11,317,169	\$14,529,240	\$14,606,232	\$14,606,232	\$14,606,232	\$5,798,560	\$3,289,062	\$76,992	\$0	\$0	\$0
2/28/20 - 2/28/21	\$16,418,104	\$8,389,431	\$10,393,879	\$12,525,856	\$14,258,194	\$15,258,194	\$16,258,194	\$8,028,673	\$6,024,225	\$3,892,148	\$2,159,910	\$1,159,910	\$159,910
2/28/21 - 2/28/22	\$14,806,280	\$8,989,237	\$10,618,039	\$11,781,379	\$12,781,379	\$13,781,379	\$14,781,379	\$5,817,042	\$4,188,240	\$3,024,900	\$2,024,900	\$1,024,900	\$24,900
2/28/22 - 2/28/23	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	\$88,319,117	\$50,115,149	\$62,342,391	\$74,721,108	\$81,235,572	\$84,235,572	\$87,235,572	\$38,203,968	\$25,976,726	\$13,598,009	\$7,083,545	\$4,083,545	\$1,083,545

Historical Analysis by Deductible - Excluding Current Year						
Historical Retention %	\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000
	56%	70%	84%	92%	95%	99%
Historical Minimum Retained	\$6,019,795	\$6,943,793	\$6,945,814	\$6,945,814	\$6,945,814	\$6,945,814
Historical Maximum Retained	\$9,280,565	\$12,202,534	\$15,945,273	\$17,672,466	\$17,672,466	\$17,672,466
Historical Average Retained	\$8,025,249	\$10,063,123	\$12,126,242	\$13,211,986	\$13,711,986	\$14,211,986

Current / expiring deductible level
Recommended marketing deductible levels

Cost by Layer		Cost contained within noted layer:					
Policy Year	Total Cost	\$0 - \$500k	\$500k - \$1M	\$1M - \$2M	\$2M - \$3M	\$3M - \$4M	\$4M - \$5M
2/28/16 - 2/28/17	\$15,906,567	\$6,664,795	\$2,238,528	\$2,126,469	\$1,978,042	\$1,000,000	\$1,000,000
2/28/17 - 2/28/18	\$6,945,814	\$6,019,735	\$923,998	\$2,021	\$0	\$0	\$0
2/28/18 - 2/28/19	\$17,672,466	\$9,280,565	\$2,921,968	\$3,742,740	\$1,727,193	\$0	\$0
2/28/19 - 2/28/20	\$14,606,232	\$8,807,671	\$2,509,498	\$3,212,071	\$76,992	\$0	\$0
2/28/20 - 2/28/21	\$16,418,104	\$8,389,431	\$2,004,448	\$2,132,077	\$1,732,238	\$1,000,000	\$1,000,000
2/28/21 - 2/28/22	\$14,806,280	\$8,989,237	\$1,628,802	\$1,163,340	\$1,000,000	\$1,000,000	\$1,000,000
2/28/22 - 2/28/23	\$1,963,654	\$1,963,654	\$0	\$0	\$0	\$0	\$0
TOTAL	\$88,319,117	\$50,115,149	\$12,227,242	\$12,378,718	\$6,514,464	\$3,000,000	\$3,000,000

Retained Cost by Layer Analysis - Excluding Current Year					
\$0 - \$500k	\$500k - \$1M	\$1M - \$2M	\$2M - \$3M	\$3M - \$4M	\$4M - \$5M
MINIMUM	MINIMUM	MINIMUM	MINIMUM	MINIMUM	MINIMUM
\$6,019,795	\$9,23,998	\$2,021	\$0	\$0	\$0
AVERAGE	AVERAGE	AVERAGE	AVERAGE	AVERAGE	AVERAGE
\$8,025,249	\$2,037,874	\$2,063,120	\$1,085,744	\$500,000	\$500,000
MAXIMUM	MAXIMUM	MAXIMUM	MAXIMUM	MAXIMUM	MAXIMUM
\$9,280,565	\$2,921,968	\$3,742,740	\$1,978,042	\$1,000,000	\$1,000,000

Sample Auto Liability Loss Retention / Transfer Analysis - Cost and Claim Count

Data: Losses as of 12/22/22 - excludes \$0 Claims

Claim Cost		Retention: Loss Limited to...						Transfer: Loss Excess of...					
Policy Year	Total Incurred	\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000	\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000
2/28/16 - 2/28/17	\$15,906,567	\$6,664,795	\$8,903,323	\$11,029,791	\$13,007,833	\$14,007,833	\$15,007,833	\$9,241,773	\$7,003,245	\$4,876,776	\$2,898,734	\$1,898,734	\$898,734
2/28/17 - 2/28/18	\$6,945,814	\$6,019,795	\$6,943,793	\$6,945,814	\$6,945,814	\$6,945,814	\$6,945,814	\$926,019	\$2,021	\$0	\$0	\$0	\$0
2/28/18 - 2/28/19	\$17,672,466	\$9,280,565	\$12,202,534	\$15,945,273	\$17,672,466	\$17,672,466	\$17,672,466	\$8,391,901	\$5,469,932	\$1,727,193	\$0	\$0	\$0
2/28/19 - 2/28/20	\$14,606,232	\$8,807,671	\$11,317,169	\$14,529,240	\$14,606,232	\$14,606,232	\$14,606,232	\$5,798,560	\$3,289,062	\$76,992	\$0	\$0	\$0
2/28/20 - 2/28/21	\$16,418,104	\$8,389,431	\$10,398,879	\$12,525,956	\$14,258,194	\$15,258,194	\$16,258,194	\$8,028,673	\$6,024,225	\$3,892,148	\$2,159,910	\$1,159,910	\$159,910
2/28/21 - 2/28/22	\$14,806,280	\$8,983,237	\$10,618,039	\$11,781,379	\$12,781,379	\$13,781,379	\$14,781,379	\$5,817,042	\$4,188,240	\$3,024,900	\$2,024,900	\$1,024,900	\$24,900
2/28/22 - 2/28/23	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$1,963,654	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	\$88,319,117	\$50,115,149	\$62,342,391	\$74,721,108	\$81,235,572	\$84,235,572	\$87,235,572	\$38,203,968	\$25,976,726	\$13,598,009	\$7,083,545	\$4,083,545	\$1,083,545

Historical Analysis by Deductible - Excluding Current Year						
Historical Retention %	\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000
		56%	70%	84%	92%	95%
Historical Minimum Retained	\$6,019,795	\$6,943,793	\$6,945,814	\$6,945,814	\$6,945,814	\$6,945,814
Historical Maximum Retained	\$9,280,565	\$12,202,534	\$15,945,273	\$17,672,466	\$17,672,466	\$17,672,466
Historical Average Retained	\$8,025,249	\$10,063,123	\$12,126,242	\$13,211,986	\$13,711,986	\$14,211,986

Current / expiring deductible level
Recommended marketing deductible levels

Claim Count		Count: Claims at or below...					
Policy Year	Total Count	\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000
2/28/16 - 2/28/17	165	160	161	163	164	164	164
2/28/17 - 2/28/18	176	171	175	176	176	176	176
2/28/18 - 2/28/19	230	224	225	227	230	230	230
2/28/19 - 2/28/20	265	259	261	264	265	265	265
2/28/20 - 2/28/21	161	156	157	159	160	160	160
2/28/21 - 2/28/22	207	202	204	206	206	206	206
2/28/22 - 2/28/23	155	155	155	155	155	155	155
TOTAL	1,359	1,327	1,338	1,350	1,356	1,356	1,356

Count: Claims in Excess of...					
\$500,000	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000	\$5,000,000
5	4	2	1	1	1
5	1	0	0	0	0
6	5	3	0	0	0
6	4	1	0	0	0
5	4	2	1	1	1
5	3	1	1	1	1
0	0	0	0	0	0
32	21	9	3	3	3

Sample: Auto Liability Detail Overview

Data: Cost and Count overview, with detail of claims in excess of \$100,000 (including % of total contribution)

Data: Losses as of 12/22/22 - excludes \$0 claims

		2/28/16 - 2/28/17	2/28/17 - 2/28/18	2/28/18 - 2/28/19	2/28/19 - 2/28/20	2/28/20 - 2/28/21	2/28/21 - 2/28/22	2/28/22 - 2/28/23
Total Cost and Count by Policy Year	Total Incurred Cost	\$15,906,567	\$6,945,814	\$17,672,466	\$14,606,232	\$16,418,104	\$14,806,280	\$1,963,654
	Total Claim Count	165	176	230	265	161	207	155
Claims with Incurred Cost under \$100,000	Incurred Cost	\$2,118,515	\$2,316,818	\$2,571,145	\$3,391,267	\$2,479,452	\$2,917,080	\$1,811,142
	Claim Count	151	164	207	248	138	186	154
Claims with Incurred Cost over \$100,000	Incurred Cost	\$13,788,052	\$4,628,996	\$15,101,321	\$11,214,965	\$13,938,653	\$11,889,200	\$152,512
	Claim Count	14	12	23	17	23	21	1
% Contribution of Claims w/cost over \$100,000.	Cost - % of total	86.7%	66.6%	85.5%	76.8%	84.9%	80.3%	7.8%
	Count - % of total	8.5%	6.8%	10.0%	6.4%	14.3%	10.1%	0.6%

CLOSED Cost Detail: Total Incurred Cost of claims over \$100,000. Ranked in descending order of severity.	\$5,898,734	\$1,002,021	\$2,963,982	\$2,076,992	\$5,159,910	\$5,024,900
	\$1,089,571	\$695,429	\$2,708,059	\$1,993,439	\$235,609	\$410,154
	\$1,036,897	\$678,330	\$2,055,151	\$863,891	\$200,061	\$265,507
KEY	\$738,528	\$545,701	\$1,529,387	\$645,607	\$198,362	\$160,028
Claims in excess of \$1,000,000 (Large Outlier Claim)	\$318,809	\$504,537	\$1,213,353	\$287,749	\$166,346	\$160,028
Claims between \$500,000 and \$1,000,000 (over current deductible of \$500,000)	\$306,002	\$331,636	\$921,968	\$255,238	\$139,746	\$128,275
Claims between \$250,000 and \$500,000 (up to threshold of current \$500k deductible)	\$270,120	\$227,427	\$351,921	\$150,792	\$131,167	\$107,507
	\$245,442	\$171,065	\$326,875	\$140,958	\$108,992	
	\$244,693	\$141,936	\$291,165	\$136,769	\$100,491	
	\$183,822	\$118,592	\$259,999	\$119,078		
	\$178,199	\$109,477	\$249,713	\$111,017		
	\$160,005	\$102,844	\$247,560			
	\$139,188		\$201,602			
			\$178,557			
			\$177,832			
			\$163,317			
			\$138,762			
			\$137,318			
			\$117,562			
			\$115,000			

OPEN Cost Detail: Total Incurred Cost of claims over \$100,000. Ranked in descending order of severity.	\$2,978,042	\$1,612,748	\$2,732,238	\$1,081,927	\$152,512
	\$292,539	\$1,605,883	\$1,084,020	\$1,081,413	
		\$350,000	\$1,048,057	\$603,552	
		\$331,504	\$504,448	\$525,250	
		\$292,175	\$497,881	\$345,329	
		\$241,124	\$340,226	\$309,847	
			\$251,313	\$279,478	
			\$179,006	\$276,011	
			\$175,795	\$252,363	
			\$173,629	\$249,837	
			\$159,892	\$200,750	
			\$125,936	\$185,319	
			\$113,812	\$132,760	
			\$111,717	\$108,962	

Appendix B – Resumes



Joseph R. Blasi, CPCU, ARM

Senior Executive Vice President / Account Manager

Houston, TX

713-940-6565

Joe.Blasii@MarshMMA.com

Years of Experience: Since 1993 **Years with McGriff:** Since 1997

Education

Bachelor of Business Administration in Finance, University of St. Thomas (Summa Cum Laude)
CNA Technical Insurance School

Licenses/Certifications

Associate in Risk Management (Insurance Institute of America)
Chartered Property & Casualty Underwriter (American Institute for CPCU)
Licensed Risk Manager (Texas Department of Insurance)

Areas of Expertise

- Government & Public Entities
- Educational Institutions
- Catastrophic Property Insurance Placements
- Alternative Risk Financing Programs, Including:
- Retrospective Rating Programs
- All Lines Basket Aggregate Programs
- Collateralized Deductible Programs
- Captives (Heterogeneous And Homogenous Groups)
- Professional Liability Exposures
- Third Party Claims Administration Programs
- Construction Insurance Programs
- Risk Sharing Pools
- Owner Controlled Insurance Programs



Ben Odom

Senior Vice President

Houston, TX

713-273-2606

Ben.Odom@MarshMMA.com

Years of Experience: Since 2010 **Years with McGriff:** Since 2014

Education

BBA, Risk Management/Insurance, St. Mary's University

BBA, Finance, St. Mary's University

MBA, St. Mary's University

Licenses/Certifications

Certified School Risk Manager

Underwriting Professional Development Program

General Agents License

Various Non-Resident Licenses

Areas of Expertise

- Government & Public Entities
- Educational Institutions
- Catastrophic Property Insurance Placements
- Alternative Risk Financing Programs
- Underwriting Analysis
- Risk Analysis
- Collateralized Deductible Programs
- Exposure/Control Analysis
- Professional Liability Exposures
- Third Party Claims Administration Programs
- Rate Justification Analysis
- Risk Sharing Pools
- Owner Controlled Insurance Programs
- Claim Handling



Wes Folsie

Account Executive

Houston, TX

979-583-8166

Wesley.Folsie@MarshMMA.com

Years of Experience: Since 2024 **Years with McGriff:** Since 2024

Education

BBA, Banking and Financial Institutions, Sam Houston State University

BBA, Finance, Sam Houston State University

MBA, Sam Houston State University

Licenses/Certifications

General Agents License

Commercial Lines Coverage Specialist

Middle Market Risk Manager Certification

Areas of Expertise

- Government & Public Entities
- Educational Institutions
- Catastrophic Property Insurance Placements
- Coastal Risk Assessment & Mitigation
- Client & Underwriter Collaboration
- Risk Analysis
- Exposure/Control Analysis
- Complex Property Program Design
- Third Party Claims Administration Programs
- Rate Justification Analysis
- High – Hazard Zone Risk Analysis
- Large Statement of Values Review



Victoria Kidwiler

Vice President, Account Executive

Houston, TX

713-244-7696

Victoria.Kidwiler@MarshMMA.com

Years of Experience: Since 2014 **Years with McGriff:** Since 2025

Education

BA, Organizational Communication, Stephen F. Austin State University

Licenses/Certifications

Property & Casualty General Agents License

Life & Health General Agents License

Certified Insurance Service Representative

Certified Insurance Counselor

Areas of Expertise

- Government & Public Entities
- Educational Institutions
- Catastrophic Property Insurance Placements
- Coastal Risk Assessment & Mitigation
- Client & Underwriter Collaboration
- Risk Analysis
- Collateralized Deductible Programs



Diana Smetters

Account Manager

Houston, TX

713-940-6596

Diana.Smetters@MarshMMA.com

Years of Experience: Since 1994 **Years with McGriff:** Since 2012

Licenses/Certifications

General Agents License – Texas

CRIS Designation (Construction Risk Insurance Specialist)

Areas of Expertise

Experienced in handling large accounts with extensive Property and Automobile exposures.

- Public entities, school districts
- Nursing homes
- Construction/Contracting Risks
- Large property schedules



Shelly Kirkham

Client Service Specialist

Houston, TX

713-273-2648

Shelly.Kirkham@MarshMMA.com

Years of Experience: Since 2016 **Years with McGriff:** Since 2016

Education

Attended College of the Desert 2005-2007

Licenses/Certifications

General Agents License, Texas

Areas of Expertise

- **Account Administration:** Assist ASR with daily servicing of client needs including addition and deletion of locations, vehicles, accounting, issuing Certificate of Insurance.
- **Property & Casualty Accounts**



Chad Williamson

Vice President, Executive Risk Advisors
Houston, TX

713-940-6548 | 832-918-1768
Chad.Williamson@MarshMMA.com

Years of Experience: Since 2005 **Years with McGriff:** Since 2014

Education

Bachelor of Business Administration, Texas Tech University

Licenses/Certifications

Registered Professional Liability Underwriter Designation (RPLU)

Areas of Expertise

- Executive Risk Advisors
 - Directors & Officers Liability
 - Fiduciary Liability
 - Employment Practices
 - Liability
 - Professional/Errors & Omissions Liability
 - Commercial Crime
 - Special Crime
 - Cyber and Privacy Coverage



Ben Vasant

Loss Control Engineer

Houston, TX

713-940-6589 | 832-499-5581

Ben.Vasant@MarshMMA.com

Years of Experience: Since 2013 **Years with McGriff:** Since 2018

Education

Bachelor of Science, University of Texas at Austin

Licenses/Certifications

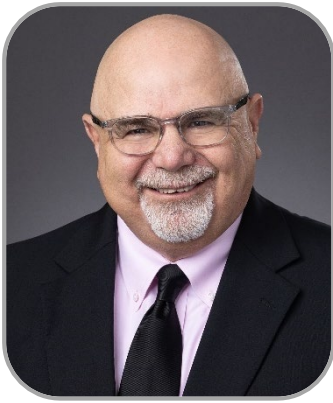
Chartered Property Casualty Underwriter (CPCU)

Associate in Risk Management (ARM)

Associate Safety Professional (ASP)

Areas of Expertise

- Risk control service delivery for large commercial casualty accounts, including: Construction, Manufacturing, Hospitality industries
- Controlled insurance programs/Wrap-Ups
- Safety program development
- Facility and site audits/inspections
- Accident/loss investigations
- Fleet management
- Loss trend analysis



Frank DeLeon

Senior Vice President

Houston, TX

713-402-1420

Frank.DeLeon@MarshMMA.com

Years of Experience: Since 1984 **Years with McGriff:** Since 2007

Education

B.B.A., Finance, Texas State University, 1983

Licenses/Certifications

Multi-Lines Insurance Adjuster (17-08)

General Agents License, Texas

Areas of Expertise

- Risk Management
- Claims Analysis
- Due Diligence
- Policy Development/Implementation
- Cost Containment
- TPA Oversight & Vendor Management/Relations
- Account Management
- Training and Supervision
- General Management
- Bilingual Spanish



Tom Bradt

Senior Vice President

Houston, TX

713-940-6500

Tom.Bradt@MarshMMA.com

Years of Experience: Since 2010 **Years with McGriff:** Since 2010

Education

Bachelor of Business Administration in Finance, University of Houston

Licenses/Certifications

General Agent License, TX

Certified Risk Manager (CRM)

Associate in Risk Management (ARM)

Certified Insurance Counselor (CIC)

Areas of Expertise

- Loss data analysis for customized reports
- Risk retention analysis and program structure testing
- Auditing NCCI Experience Modifiers
- Evaluation and negotiation of legacy program adjustments
- Calculating and negotiating collateral requirements
- Cost of Risk assessments
- Developing customized analytical tools to meet specific needs



Michael Ortega

Vice President

Houston, TX

713-273-2603

Michael.Ortega@MarshMMA.com

Years of Experience: Since 2014 **Years with McGriff:** Since 2014

Education

B.B.A. Finance – Barry University, 2013

Areas of Expertise

- Experience Modifier Rating
- Analyses of loss data
- Risk retention analysis and program structure testing
- Calculating and negotiating collateral requirements
- Cost of Risk reports
- Customized analytical reports

About McGriff

When it comes to protecting what matters most in business and everyday life, we believe our clients should never settle for less than the best. For more than a century, we've relied on expertise, resources, and relationships to deliver insurance and risk management solutions focused on our clients' priorities and what they value most.

McGriff is part of Marsh McLennan Agency, one of the largest insurance brokers in the U.S. Our solutions include commercial property and casualty, corporate bonding and surety, cyber, executive risk, management and professional liability, captives and alternative risk transfer programs, employee benefits, small business and personal lines insurance.

Our experienced risk management specialists develop highly tailored solutions while listening, learning, and executing with precision under the guidance of our four core principles:

Integrity: We do what we say, every time.

Determination: We relentlessly pursue success on your behalf.

Passion: We are specialists in our field driven to serve you.

Collaboration: We build strong relationships with colleagues, partners, and you to create the best solutions.

The world is ever changing as is the risk environment facing businesses and individuals alike. McGriff is committed to providing our clients with the guidance necessary to help them successfully navigate their risk path.

Join the thousands of businesses, organizations and individuals across the country who choose McGriff, a firm dedicated to building longterm relationships and helping protect your most valuable assets.

With McGriff, you'll never have to settle for less.

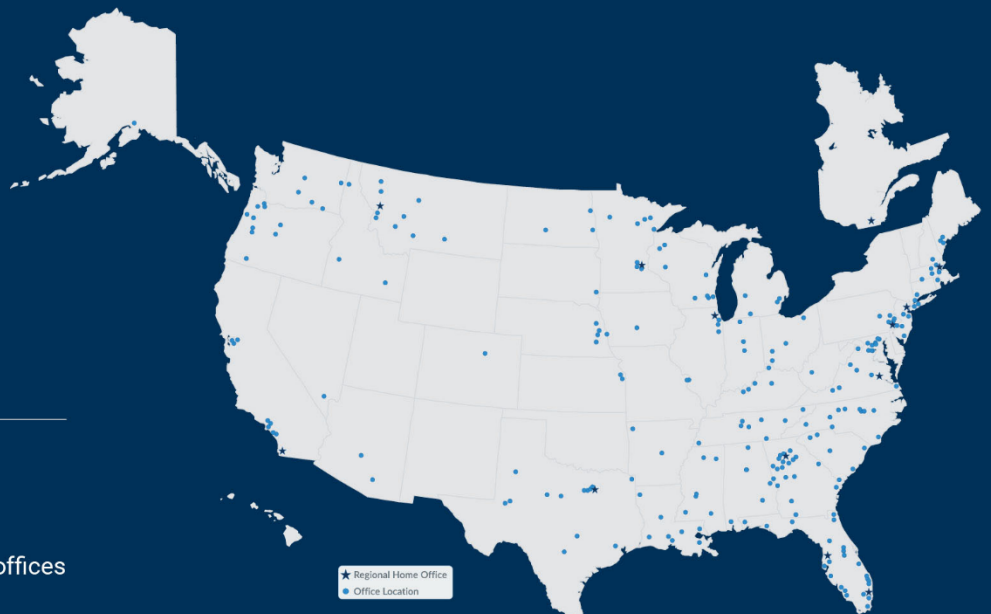
MMA By the Numbers

\$5 Billion
Annual Revenue

15,000
Colleagues

300
Office Locations
in the U.S.

130
Countries with
Marsh McLennan offices





Industry Expertise



Auto Dealerships



Aviation



Construction



Energy



Financial



Forestry & Building Products



Government Contractors



Legal



Manufacturing



Marine



Mergers & Acquisitions



Mining



Oil & Gas



Port & Terminal



Public Entity & Education



Real Estate & Hospitality



Restaurants & Retail



Senior Living



Technology & Communication



Transportation



Our Service Philosophy

Our philosophy on client service rests heavily on McGriff's rich experience, proactive engagement and the consistency to deliver innovative and client-focused solutions. This approach empowers our clients to conduct their business responsibilities and fulfill similar obligations to their customers.

Our Staff

McGriff is committed to hiring, developing and retaining the best and brightest people within our industry. We place an emphasis on hiring individuals that are experienced in the niche industries on which we focus. Our goal is to provide our customers with the highest level of professionalism, creative thinking and service available.

Our Structure

McGriff's organizational structure supports its client-centered approach to doing business. We are a flat organization that operates with a minimum of bureaucracy. Each group is uniquely positioned to respond immediately to customer requests.

Our Leadership

Our senior management maintains hands-on involvement with account service activities to ensure the highest level of service and responsiveness. Regardless of what leadership level they have obtained, all of our employees are first and foremost in the insurance business.

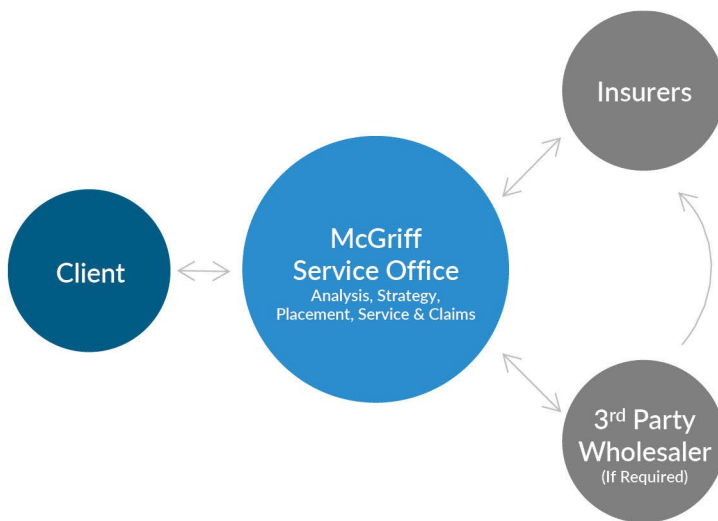
Our Work Product

Our focus on the customer enables us to provide solutions that are as unique as each of our clients. From comprehensive program design to alternative risk transfer mechanisms, we provide the solution that is the best fit for each client. Throughout the consulting engagement, we never lose sight of who we are working for and continually search for ways to improve and deepen our product and service offerings.

Our Service Model

Our team has the knowledge and the experience to service your account but most of all, key relationships that have spanned decades within the insurance industry. Our approach to servicing our clients is not a fragmented approach, but a team approach that personally takes responsibility for all facets of our clients' needs.

McGriff Service Model



- Niche-focused Account Service Team centrally- located and multi-disciplined
- All team members accountable and involved in day-to-day service functions; 24/7 availability
- Strong team dynamic; close-knit group. Long-term continuity & extremely low turnover
- Model promotes creativity, expertise and specialized solutions; provides most direct access to insurance market
- Model drives innovation, automation, efficiency and data analytics to assist companies achieve their risk goals and objectives.
- Corporate leadership fully integrated into service
- Dedicated claims team

Traditional Broker Service Model



- Lack of specialization held by Account Managers
- Multiple points of contact, limited ownership
- Separation of day-to-day service functions; lack of continuity in reporting lines
- Corporate leadership isolated from the service process
- Structured for large volume, standardized business; but not highly specialized / customized solutions



[Visit McGriff.com.](https://www.mcgriff.com)

McGriff, a Marsh & McLennan Agency LLC Company

10100 Katy Freeway, Suite 400

Houston, TX 77043

McGriff.com

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EXHIBIT B COMMISSION PERCENTAGE FORM			
INSURANCE BROKER COMMISSION PERCENTAGE		5.00%	



**BRAZORIA COUNTY
PURCHASING DEPARTMENT
237 E. LOCUST STREET, SUITE 406
ANGLETON, TEXAS 77515
TEL: 979-864-1825 FAX: 979-864-1034**

**BRAZORIA COUNTY
REQUEST FOR PROPOSAL COVER SHEET**

The REQUEST FOR PROPOSAL (RFP) and accompanying documents are for your convenience in submitting an offer for the referenced products and/or services for BRAZORIA COUNTY.

“RFP #26-09 INSURANCE BROKER FOR BRAZORIA COUNTY”

WEDNESDAY, NOVEMBER 19, 2025 at 11:00 A.M. LOCAL TIME

Sealed Hard Copy or Electronic offers shall be received no later than:

***PROPOSAL OPENING WILL BE AVAILABLE VIA ZOOM. MEETING LINK IS AVAILABLE ON THE PROJECT DETAILS PAGE IN BONFIRE UNDER “IMPORTANT EVENTS”. BONFIRE LINK:**

<https://brazoriacounty.bonfirehub.com/portal/?tab=login>

IF SUBMITTING AN ELECTRONIC SEALED OFFER:

PREFERRED METHOD IS USING THE “BONFIRE” ELECTRONIC BIDDING PLATFORM.

USE LINK, <https://brazoriacounty.bonfirehub.com/portal/?tab=login>,

CLICK THE HELP BUTTON PROVIDED IN THE BONFIRE WEBSITE AS NEEDED.

IF SUBMITTING A HARD COPY SEALED OFFER:

THE PHYSICAL ADDRESS FOR COURIERS, HAND DELIVERIES AND THE US POSTAL SERVICE IS:

SUSAN SERRANO, CPPO, CPPB
PURCHASING DIRECTOR
BRAZORIA COUNTY COURTHOUSE CAMPUS ADMINISTRATION BUILDING
237 E. LOCUST STREET, SUITE 406
ANGLETON, TEXAS 77515

PLEASE USE THE RETURN LABEL PROVIDED WITH THIS SOLICITATION:

*****Please note: US Postal Service mailing address***

The U.S. mail may not deliver to the physical address shown above. Respondents who prefer to use the U.S. mail may submit their offers using the U.S. Postal Service mailing address shown above.

However, packages delivered by the U.S. Postal Service to the Brazoria County mailing address are subject to delays that may cause a response to be rejected due to missing a solicitation receipt deadline.

Responses delivered to the mailing address are routed through the County mailroom and may not reach the required location in time for the bid / offer opening.

Respondents using the U.S. mail should take this possible delay into account when using the U.S. mail.

BRAZORIA COUNTY is very conscious and extremely appreciative of the time and effort you have expended to submit an offer. We would appreciate it if you would indicate on any “No Offer” response, any requirement of this RFP which may have influenced your decision to “No Offer”. If your response to this RFP is a “No Offer” response, please complete the Statement of No Offer in this RFP package and submit.

Any prospective respondent desiring any explanation or interpretation of the solicitation must make a written request online through Bonfire electronic platform or email the project facilitator as shown in Section “Questions Due Date (for Clarifications)”, which must be received by the Purchasing Department at least five (5) business days prior to the scheduled time for the offer opening. Any information given to a prospective respondent concerning this solicitation will be furnished promptly to all other known prospective respondents as a written amendment/addendum to the solicitation. Brazoria County reserves the right to accept or reject any or all bids/offers as it deems in its best interest and to waive any formalities.

It is the Respondent’s responsibility to verify the issuance of Addenda in regard to this Offer. All Addenda shall be submitted to all known respondents and shall be posted on the Bonfire electronic bidding platform at <https://brazoriacounty.bonfirehub.com/portal/?tab=login>. Brazoria County shall not be responsible for failed internet connections or power interruptions.

All required Offer documents shown on the Table of Contents, including any Addenda Receipt Forms which may have been issued, must be submitted in the Bonfire electronic bidding platform or a sealed envelope included in a hard copy submittal, marked with the bidder’s company name, the Offer name, number and due date.



SUSAN SERRANO, CPPO, CPPB
Purchasing Director
Brazoria County Courthouse Campus Administration Building
237 E. Locust Street, Suite 406
Angleton, Texas 77515

Published Dates: TUESDAY, OCTOBER 21, 2025 AND TUESDAY, OCTOBER 28, 2025

BRAZORIA COUNTY CONTRACT SHEET

THE STATE OF TEXAS COUNTY OF BRAZORIA

This memorandum of agreement made and entered into on the _____ day of _____, 2025, by and between Brazoria County in the State of Texas (hereinafter designated County), acting herein by County Judge L.M. "Matt" Sebesta, Jr., by virtue of an order of Brazoria County Commissioners' Court, and _____ (hereinafter designated Vendor / Contractor).
(company name)

WITNESSETH:

The Vendor and the County agree that the Instructions to Respondents, Specifications/Statement of Work, Standard Terms & Conditions, and all other requirements herein for RFP #26-09 INSURANCE BROKER FOR BRAZORIA COUNTY as stated in the Request for Proposal Table of Contents hereto attached and made a part hereof, together with the bond (when required), vendor's response and negotiated pricing, shall constitute the full agreement and Contract between parties and for furnishing the items set out and described; the County agrees to pay the prices stipulated in the accepted offer.

The order of precedence shall be:

- Brazoria County RFP #26-09 INSURANCE BROKER FOR BRAZORIA COUNTY
- Vendor's submittal to the above listed RFP and the final accepted pricing

It is further agreed that this Contract shall not become binding or effective until signed by the parties hereto and a purchase order authorizing the items desired has been issued.

Executed at Angleton, Texas this _____ day of _____ 2025.

By: _____
County Judge Signature

By: _____
Printed Name

By: _____
Signature of Vendor

By: _____
Printed Name and Title

**SIGNATURE REQUIRED BY
VENDOR UPON AWARD**

REQUEST FOR PROPOSAL TABLE OF CONTENTS

RFP #26-09 INSURANCE BROKER FOR BRAZORIA COUNTY

All documents included in this Table of Contents represent components which comprise this bid/offer package and subsequent awarded executed contract. The documents shown in Exhibit A and Exhibit B are required to be submitted in your bid/offer package. *It is the respondent's responsibility to be thoroughly familiar with all requirements and specifications. Be sure you understand the requirements before you return your bid/offer packet.*

The “Exhibit A - Required Forms” and “Exhibit B – Additional Requirements” below are required to be uploaded into the Bonfire electronic procurement portal system or included with your hard copy submittal in one (1) large sealed envelope or box with the Brazoria County Return Label affixed.

FAILURE TO RETURN THE FOLLOWING FORMS MAY DEEM YOUR PROPOSAL AS NON-RESPONSIVE.

EXHIBIT A – REQUIRED DOCUMENTS

- RESPONDENT CERTIFICATION FORM
- BIDDER/RESPONDENT’S AFFIRMATION & SDNs/BLOCKED PERSONS AFFIRMATION
- WORKERS COMPENSATION REQUIREMENTS
- CERTIFICATION REGARDING LOBBYING FORM
- EXCEPTIONS TO STANDARD TERMS & CONDITIONS & SPECIAL REQUIREMENTS (*if applicable*) (If vendor has any exceptions to the RFP terms & conditions or special requirements, they must be included with the RFP submittal in order to be considered)
- NON COLLUSION AFFIDAVIT
- CONFLICT OF INTEREST QUESTIONNAIRE – FORM CIQ (*if applicable*)
- TEXAS GOVERNMENT CODE 552, SUBCHAPTER J ACKNOWLEDGEMENT FORM
- PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES AND EQUIPMENT CERTIFICATION FORM (*Vendor to sign form if applicable to telecommunications*)
- AUTHORIZED NEGOTIATOR
- RESIDENT / NONRESIDENT BIDDER PROVISIONS
- VENDOR DATA SHEET & W-9 FORM

EXHIBIT B – VENDOR’S RESPONSE

- BID TABLE
- VENDOR RESPONSE TO EVALUATION CRITERIA
- EXCEPTIONS TO STANDARD TERMS & CONDITIONS & SPECIAL REQUIREMENTS (*if applicable*) (If vendor has any exceptions to the RFP terms & conditions or special requirements, they must be included with the RFP submittal in order to be considered)
- SIGNED ADDENDA (*if applicable*)
- ADDITIONAL VENDOR SUBMITTED ATTACHMENTS (*REMOVE IF NOT APPLICABLE TO PROJECT*)

Attachments to the RFP:

- Exhibit A – Required Documents
- Exhibit B – Vendor’s Response
- Attachment A – Commission Percentage Form

BRAZORIA COUNTY

SPECIFICATIONS / SCOPE OF WORK

RFP #26-09 INSURANCE BROKER FOR BRAZORIA COUNTY

The following requirements and specifications shall be in addition to the other requirements contained herein and shall supersede the other requirements where applicable.

1.0 SCOPE

Brazoria County, Texas (hereafter referred to as the (“County”)) seeks sealed Proposals (“Proposals or RFP”) from qualified firms seeking to act as an insurance broker of record (“Respondent”) with respect to the County’s property and casualty insurance program.

Respondents must offer a proposal that will meet the scope of services, qualifications and general description of work activities identified in the RFP.

It is the County's intention and expectation to pay a fixed sum fee-basis only for the provision of those services, including all out-of-pocket expenses, as mandated by statutory guidelines.

2.0 GENERAL REQUIREMENTS

The County has multiple lines of self-insurance/excess insurance coverage as part of its’ property and casualty program which include, but not limited to, the following coverage lines:

Property, Boiler and Machinery, Museum Liability, Public Officials and Law Enforcement Liability, Cyber Risk, Pollution, Flood, Consolidated Crime, Aviation and Professional Liability.

The Risk Management Department is responsible for administering the program for the County.

3.0 DETAILED SCOPE OF WORK

The Broker shall provide the following services to the County:

- 3.1 Insurance placement; including insurance marketing, coverage analyses and policy binding. This may include the procurement of policies in addition to those mentioned in this RFP as needed.
- 3.2 Assist in the preparation of materials, statements of value, specifications and other underwriting data as required by insurers. This includes working with the County to gather, prepare and present the necessary information to the carriers.
- 3.3 Assist the County with proposal review, selection and negotiations with interested insurance carriers to obtain the most favorable rates, policy language and premiums available to the County.
- 3.4 Act upon the selected course of action/program and put forth into full force and effect without any lapse of coverage the necessary policies and coverage on behalf of the County and work with County personnel and the insurance companies’ personnel to ensure a smooth transition, when necessary.
- 3.5 Review all existing coverage and make recommendations regarding any changes in coverage based on such things as unintentional self-insurance, gaps in coverage, restrictive limits, and cost of coverage.
- 3.6 Issue insurance documents such as certificates and binders as required by the County.
- 3.7 Consult with the County regarding the effectiveness of the program, review proposed changes and new coverage in anticipation of next year’s insurance program, including but not limited, to the evaluation of alternative insurance and/or risk financial proposals.

- 3.8 Advise the County on questions of insurance both as to coverage for the County itself and as to insurance to be obtained from various contractors and agencies doing business with/for the County.
- 3.9 Advise the County whenever new coverage becomes available and consult with the County on the advisability of obtaining such coverage.
- 3.10 Research technical exposure and coverage questions.
- 3.11 Review insurance policies for appropriate coverage, provisions and conditions, exclusions and endorsements.
- 3.12 Verify the accuracy and adequacy of all binders, policies, policy endorsements, carrier invoices, and other insurance-related documents prior to delivery.
- 3.13 Order and process change endorsements.
- 3.14 All coverage written shall be received net of commissions.
- 3.15 Bill and process insurance invoices.
- 3.16 Coordinate Carrier value-added services such as loss control inspections.
- 3.17 Make risk identification, analysis, and reduction recommendations.
- 3.18 Establish and maintain, with the cooperation of County personnel, an up-to-date listing of all real and personal property owned and/or leased by the County and intended to be covered under any policies of insurance.
- 3.19 Assist with large loss reporting and resolution of large losses and catastrophic claims. Participate in and advise in quarterly claims meetings.
Serve as consultant to the County with resolving Carrier issues.
- 3.20 Consultative assistance with Special Projects such as cost allocation, benchmarking and loss control accountability/incentive programs

BRAZORIA COUNTY INSTRUCTIONS TO RESPONDENTS

RFP #26-09 INSURANCE BROKER FOR BRAZORIA COUNTY

The following requirements and specifications shall be in addition to the other requirements contained herein and shall supersede the other requirements where applicable.

1.0 THE CONTRACT:

The Contract consists of all documents included in this Request for Proposal Number 26-09, as well as addenda issued prior to execution of the Contract and modifications issued after execution of the Contract. The Contract represents the entire and integrated agreement between the parties hereto and supersedes prior negotiations, representations, or agreements, either written or oral. The Contract may only be amended or modified under the terms of this Contract. Brazoria County may make partial or complete awards to one or more vendors (if applicable) whichever is in the best interest of the County.

2.0 ESTIMATED PROJECT TIMELINE *(dates may be subject to change)*

Step One –

Publicly advertised (1st Notice)	October 21, 2025
Publicly advertised (2nd Notice)	October 28, 2025
Deadline for Questions (Clarifications) Submitted	November 4, 2025
Deadline for Addendum to be posted in Bonfire	November 11, 2025

Response Open/Due date by 11:00 a.m. C.S.T. November 19, 2025

Step Two – Interviews *(if requested by committee)*

Interviews with short-listed candidates

Negotiations *(if applicable to project)*

Enter into negotiations with highest ranked firm TBD

Award - Contract approval by Commissioner's Court December

3.0 QUESTIONS DUE DATE (FOR CLARIFICATIONS)

Any prospective respondent desiring any explanation or interpretation of the proposal must make a written request which must be received by the Purchasing Department on or before Tuesday, November 4, 2025. The request must be emailed to bidclarifications@brazoriacountytx.gov. Emails must include the project name and number in the subject field.

All responses to questions or clarification requests will be answered in the form of an addendum after the question deadline and no later than 5 business days prior to the opening/closing date of the solicitation.

4.0 PRE-OFFER MEETING

There is no pre-offer meeting scheduled for this solicitation.

5.0 PROPOSAL REQUIREMENTS

The proposal includes instructions to respondents, specifications and contract documents. It is the responsibility of each Respondent before submitting a proposal to examine the contract documents thoroughly.

Respondents are required to follow the outline below when preparing their proposals. The information is to be included in Exhibit B Vendor Response.

Executive Summary

Tab 1 Qualifications of the Brokerage Firm

Tab 2 Brokerage Team

Tab 3 Innovation and Effectiveness

Tab 4 Commission Percentage

Any exceptions to the Proposal requirements shall be identified in the applicable section.

Executive Summary - This section should be limited to a brief narrative highlighting the company's background and experience. Narrative should clearly demonstrate compliance with Respondent qualifications listed in the RFP specifications. Include length of time the company has been in business and provide examples of past and current projects. Note that the executive summary is to identify the primary contacts for the Respondent.

RFP SUBMISSIONS MAY BE PROVIDED IN ONE OF TWO WAYS, AS EXPLAINED BELOW:

If submitting an RFP Electronic Document Submission (using the Bonfire electronic platform)

Respondent shall fill out and upload the "Exhibit A Required Forms" and "Exhibit B Additional Requirements" into the Bonfire electronic platform. An authorized representative of the company **MUST** sign all required forms. See "Exhibit A Required Forms" for instructions on signing electronically.

If submitting an RFP Hard Copy Document Submission

One (1) original hard copy shall be submitted, which will consist of "Exhibit A Required Forms" and "Exhibit B Additional Requirements".

The hard copy submission shall be sealed in an envelope or box for delivery to the Brazoria County Purchasing Director per instructions herein. All documents included in the response and the outside of the envelope and/or box must be labeled with the vendor name and the RFP number. A Return Label is also provided in this solicitation.

6.0 CONTRACT AWARD / EVALUATION PROCESS

An evaluation committee will examine all responses to this Request for Proposals. Responses that do not conform to the instructions given or that do not address all the questions and services specified may be eliminated from consideration. Brazoria County, however, reserves the right to accept such a response if it is determined to be in the County's best interest to do so.

Brazoria County may initiate discussions with respondents. Additional information will be accepted during this period from respondents who responded to the original request. Respondents may **NOT** initiate discussions. Brazoria County expects to conduct discussions with respondent personnel authorized to enter into contractual obligations.

Brazoria County shall rank responses in accordance with the Evaluation Criteria and will review proposal content and its conformance to requirements. Following an initial evaluation, the evaluation team may recommend award without further discussion with one or more respondents or may conduct discussions and interviews with top-ranked responsible respondent(s).

During the discussion / interview and negotiations, the evaluation team may allow the respondent(s) to submit a best and final offer. Final offers shall be evaluated on the same criteria used in the first evaluation.

The award of the contract shall be made to the responsible respondent whose proposal is determined to be the lowest and best evaluated offer resulting from negotiations, taking into consideration the relative importance of price and other evaluation factors set forth in this request for proposal.

"Lowest and best" means an offer providing the best value for the County considering associated direct and indirect costs, including transport, maintenance, reliability, life cycle, warranties and customer service after a sale.

Brazoria County is not bound to accept the lowest priced proposal if that proposal is judged not to provide the best value for the County.

Proposals will be opened publicly to identify the names of the respondents. Other contents of the proposals will not be disclosed prior to award or rejection by Brazoria County.

Brazoria County reserves the right to reject any and all proposals and is not obligated to award a contract pursuant to this request for proposal.

6.1 Financial Statements

If your company is either shortlisted or deemed the highest ranked, you may be required to submit your current and prior 2-year financial statements for review. This ensures Brazoria County that your company, if awarded, has the financial capacity to perform its obligations under for the entirety of the contract.

Failure to provide financial statements may deem your submission as non-responsive.

7.0 EVALUATION CRITERIA

Respondents will be evaluated utilizing the factors, as weighed below:

Tab 1 Qualifications of the Brokerage Firm

45 Points

Describe the brokerage firm's qualifications and resources available to provide the services listed above. Such description shall include, but not be limited to, responses to the following:

1. Identify the length of time the brokerage firm has been operating, and has operated within the Texas Public Sector Community.
2. Identify the brokerage firm's location, size, and presence, including:
 - a. The address of the brokerage firm's office that will handle the County's account.
 - b. The size of the staff at such office.
 - c. Number of clients that the brokerage firm presently serves.
 - d. The premium volume the brokerage firm produce annually and how much of that premium volume is from public entities.
3. Describe any experience and special expertise your brokerage firm has in providing the desired insurance coverages and risk management consultation services to local governmental entities, especially those in Texas.
4. Describe the insurance markets that the brokerage firm can access. Specify which of these insurance companies are most responsive to government needs.
5. Provide information documenting your brokerage firm's ability to assist the County in proving and resolving difficult claims with insurers.
6. Provide a statement of whether the brokerage firm will agree to disclose all compensation it receives as a result of contracts placed on behalf of County and, if not, an explanation of why it will not provide such information.
7. Indicate whether the brokerage firm provides full risk identification and analysis as part of broker's normal contracted services.
8. Describe what the brokerage firm will do to assure that proper attention will be given to the County's account now and as its book of business grows.
9. Describe any and all products offered that are unique to the firm such as risk management information systems, loss control programs, actuarial services, etc.

Provide a brief description of Proposer's firm, and the scope and nature of services routinely provided by Proposer. Demonstrate the ability to perform the required services as described in this RFP. Indicate Proposer's understanding of the purpose and scope of the proposed services as evidenced by the quality of the proposal submitted.

Identify the type of business (corporation, partnership, sole proprietor, etc.) under which Proposer's firm operates, date business started, and license number to do business in the State of Texas.

10. References

Provide three (3) client references (governmental entities preferred) that will document prior experience which demonstrate the Respondent's ability to perform all required services outlined in this RFP. Include the customer name, address, business type of governmental entity, contact name, telephone, email address, contract period and services provided.

Tab 2 Brokerage Team

15 Points

Provide an organizational chart showing the level of organizational responsibility and the services provided by each of the members of your firm's proposed service team.

Include resumes of those principals, partners and other key service staff members who will be directly involved in the overall brokering and consulting effort.

Resumes and organizational charts will be considered as "public information" please do not include any personal information that the person(s) do not want to be considered as "public information".

By listing the individuals in the proposal, the firm is making a commitment that, barring unforeseen circumstances, they are the personnel who will be assigned to the County. Any changes to the personnel indicated must be approved by the County. The County reserves the right to request a substitution of personnel.

Tab 3 Innovation and Effectiveness

10 Points

Describe proposer's understanding, responsiveness and approach to the insurance brokerage and consultative services required.

Also include descriptions of:

1. Any broker service innovations proposer is proposing.
2. The effectiveness of the proposed broker services and how such effectiveness is measured.
3. Any unique services or special expertise your brokerage firm offers that might bring value and/or efficiency to the County.

Tab 4 Commission Percentage

30 Points

The proposal shall set forth a commission percentage fee basis to provide all the Standard Services without collecting commission from any insurance companies.

The fee portion of your proposal must identify any other charges that would, or could, be billed in connection with the insurance brokerage and consulting services to be provided.

Brazoria County may, at its own discretion elect to opt out of having the awarded Broker of Record participate in contingent and supplemental commission arrangements with intermediaries and insurance companies that provide additional compensation and or incentives. If your company engages such arrangement, please provide information in Exhibit B Vendor Response.

Bonus Scoring (15 point scale)

7.1 Bonus Points-Interview (If requested by evaluation committee)

Your score may be adjusted up to a maximum of 15 points-total overall possible evaluation points=15

- 7.1.1 Response to Questions & Answers (0-10 points)
- 7.1.2 Interview preparedness & adherence to interview (0-5 points)

8.0 CONTRACT TERM

The award of contract shall begin on the date of execution by the County Judge and shall continue for twelve (12) months.

Further, Brazoria County reserves the right to renew the Contract every twelve (12) months for four (4) renewal periods.

Such renewal shall be subject to the terms and conditions herein contained and shall be effective only if evidenced in writing.

Brazoria County retains the option to solicit new proposals at any time if in its best interest.

9.0 PROJECT MANAGER

Ryan Erickson, District Attorney's Office

The County will maintain oversight to ensure that contractors perform in accordance with the terms, conditions and specifications of the contract.

10.0 INCLEMENT WEATHER FOR HARD COPY SUBMITTALS:

In case of inclement weather or any other unforeseen event causing the County to close for business on the date of a proposal submission deadline, the closing will automatically be postponed until the next business day the County is open and at the time shown on the Cover Sheet.

If inclement weather conditions or any other unforeseen event causes delays in carrier service operations, the County may issue an addendum to all known vendors interested in the project to extend the deadline. It will be the responsibility of the vendor to notify the County of their interest in the project if these conditions are impacting their ability to turn in a submission within the stated deadline. The County reserves the right to make the final judgment call to extend any deadline.

11.0 INSURANCE REQUIREMENTS

Vendor shall furnish certificates of insurance to County evidencing compliance with the insurance requirements hereof for the duration of the project. Certificates shall indicate name of Vendor, name of insurance company, policy number, term of coverage and limits of coverage.

Insurance shall be placed with insurers having an A.M. Best's rating of no less than A. Such insurance must be issued by a casualty company authorized to do business in the State of Texas, and in standard form approved by the Board of Insurance Commissioners of the State of Texas, with coverage provisions insuring the public from loss or damage that may arise to any person or property by reason of services rendered by Vendor.

Insurance required herein shall be maintained in full force and effect during the life of this contract and shall be issued on an occurrence basis. Vendor shall require that any and all subcontractors that are not protected under the Vendor's own insurance policies take and maintain insurance of the same nature and in the same amounts as required of Vendor and provide written proof of such insurance to Vendor. Proof of renewed/replacement coverage shall be provided upon expiration, termination, or cancellation of any policy. Vendor shall not allow any subcontractor to commence work on the subcontract until such insurance required for the subcontractor has been obtained and approved.

In the event that the insurance is renewed during the duration of the contract, Vendor shall furnish certificate of insurance to the County evidencing renewal of policy within 30 days of renewal. Vendor shall provide County with at least 30 days prior written notice of any reduction in the limit of liability by endorsement of the policy, cancellation or non-renewal of the insurance coverage required under this Agreement.

Certificates of Insurance, fully executed by a licensed representative of the insurance company written or countersigned by an authorized Texas state agency, shall be filed with the County Purchasing Agent within ten (10) business days of issuance of notification from the County Purchasing Agent to Bidder that the contract is being activated as written proof of such insurance and further provided that Bidder shall not commence work under this contract until it has obtained all insurance required herein and provided written proof as required herein.

WAIVER OF SUBROGATION:

All policies of insurance shall waive all rights of subrogation against Brazoria County, its officers, employees and agents.

ADDITIONALLY INSURED:

Further, on vendor's certificate of insurance supplied to Brazoria County, Brazoria County shall be listed as additionally insured with the exception of workers compensation insurance. The certificate holder shall be as follows:

Brazoria County
237 E. Locust Street, Suite 401
Angleton, TX 77515

12.0 CHANGE ORDERS

Due to budget constraints, change orders will be limited to those revisions that are due to unforeseen conditions and are approved by Brazoria County. Vendors are advised to fully understand the scope of work and to review the specifications and drawings in order to submit any requests for clarifications prior to the proposal opening.

In the event a change order is required and approved by Brazoria County, said changes shall be incorporated into this Contract in the form of a change order. All change orders shall be subject to the review and approval of Brazoria County Commissioner's Court, or the Court's designee, and shall be in accordance with the Local Government Code.

Any discrepancies which may be discovered between actual conditions and those represented by the specifications or drawings shall be reported at once to the Brazoria County Project Manager and work shall not proceed except at the Vendor's risk, until written instructions have been received by him from the Brazoria County Project Manager.

13.0 HISTORICALLY UNDERUTILIZED BUSINESSES (HUB's)

Historically Underutilized Businesses (HUB's) are encouraged to participate in the bid/RFP processes. Although Brazoria County does not certify HUB vendors, Brazoria County recognizes the certifications of other governmental entities. If you are certified by a government entity, please upload the certificate with your response electronically in the Bonfire electronic platform or include a hard copy of your certificate in your submittal.

14.0 SYSTEM FOR AWARD MANAGEMENT (SAM)

The System for Award Management (SAM) is the official registration required prior to bidding on a contract with any federal government agency, including local governments who receive federal funds.

Prior to award, Brazoria County will check www.sam.gov, the System for Award Management (SAM), to ensure that the proposed vendor has not been debarred. Vendor shall provide their Unique Entity ID number to Brazoria County in order to check www.sam.gov for debarment.

If you do not have a Unique Entity ID number, you can request a number for free by visiting <https://sam.gov/content/entity-registration>. For additional information about the change from DUNS to Unique Entity ID visit <https://www.gsa.gov/about-us/organization/federal-acquisition-service/office-of-systems-management/integrated-award-environment-iae/iae-systems-information-kit/unique-entity-id-is-here>.

Brazoria County is unable to conduct business with vendors who have been debarred.

If the procurement is using federal funds, the awarded vendor is required to hold an active status on the SAM.gov website, applicable, <https://sam.gov/content/home>, and with the Texas Comptroller Taxable Entity website <https://mycpa.cpa.state.tx.us/coa/>.

If the procurement is using County funds, and your company is not registered on the SAM.gov website, the County is asking that your company obtain a registration. If your company has a current Unique Entity Identifier number on the SAM.gov website, the County is requesting that your company obtain a registration.

15.0 AWARD LETTER / NOTICE TO PROCEED

After the award has been made in Commissioner's Court, an award letter will be sent to the vendor with information on how to submit any required documentation needed to finalize the award. Once all required bonds, insurance, and other applicable forms have been submitted to the Purchasing Department, the Project Manager will contact the awarded vendor and set up the project kick-off meeting, if applicable.

16.0 DISCLOSURE OF CERTAIN RELATIONSHIP

Texas Local Government Code chapter 176 requires that any vendor or person who enters or seeks to enter into a contract with a local governmental entity (including any agent of such person or vendor) disclose in the Questionnaire Form CIQ the vendor or person's employment, affiliation, business relationship, family relationship or provision of gifts that might cause a conflict of interest with a local governmental entity. By law, this questionnaire must be completed and filed with the records administrator of Brazoria County no later than the seventh business day after the date the person engages or communicates with Brazoria County or becomes aware of facts that require the completion of the questionnaire pursuant to Texas Local Government Code section 176.006.

A person commits an offense if the person knowingly violations Texas Local Government Code section 176.006. An offense under this section is a Class C misdemeanor.

A copy of House Bill 23 which amended the Texas Local Government Code Chapter 176 is available at: <http://www.capitol.state.tx.us/tlodocs/84R/billtext/html/HB00023F.HTM>
Texas Local Government Code Chapter 176 can be found here: <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>

Questionnaire Form CIQ is included in this bid/offer.

By submitting a response to this request, the vendor or person represents compliance with the requirements of Texas Local Government Code chapter 176. If required, completed forms should be sent with your proposal, as well as to:

Brazoria County Courthouse
County Clerk's Office
111 E. Locust Street, Suite 200
Angleton, TX 77515

17.0 CERTIFICATE OF INTERESTED PARTIES

Effective January 1, 2016, all contracts and contract amendments, extensions, or renewals executed by the Commissioners Court will require the completion of Form 1295 "Certificate of Interested Parties" pursuant to Government Code § 2252.908. Form 1295 must be completed by awarded vendor at time of signed contract submission.

Form 1295 and definitions are included in this bid/offer for your information.

All responding vendors may access a video from the Texas Ethics Commission which explains the process on how to submit Form 1295. The video link is available on the Brazoria County Purchasing website at <http://brazoriacountytx.gov/departments/purchasing/doing-business>.

18.0 BACKGROUND CHECKS AND NON-DISCLOSURE AGREEMENTS:

It is the policy of the County that contractor employees and subcontractors that will complete work in sensitive areas on Brazoria County property be subject to a criminal background check. The County reserves the right to determine a sensitive area and the appropriateness of a criminal background check for any contractor employee or subcontractor.

Non-Disclosure Agreements (NDA) may also be required by Brazoria County. NDAs will be provided to contractor employees and any subcontractors by the Purchasing Department and must be signed and returned in a time frame determined by Purchasing Department

BRAZORIA COUNTY BID TABLE SUBMITTAL INSTRUCTIONS

RFP #26-09 INSURANCE BROKER FOR BRAZORIA COUNTY

Please follow the instructions found in Item 1.0 if you are submitting your bid electronically using Bonfire electronic bidding platform

1.0 ONLINE OFFER SUBMISSION (*PREFERRED METHOD OF SUBMISSION*)

RESPONDENTS ARE TO DOWNLOAD AND FILL OUT THE ONLINE BID TABLE FROM BONFIRE AND THEN UPLOAD THE COMPLETED TABLE INTO BONFIRE TO BE INCLUDED WITH THEIR ONLINE PROPOSAL SUBMISSION.

Please follow the instructions found in Item 2.0 if you are submitting a sealed hard copy proposal

2.0 HARD COPY PROPOSAL SUBMISSION

RESPONDENTS ARE TO INCLUDE WITH THEIR SEALED HARD COPY PROPOSAL, A PRINTED COPY OF ATTACHMENT A BID TABLE.

GENERAL: Brazoria County reserves the right to accept or reject any or all bids and waive all technicalities.

BRAZORIA COUNTY STATEMENT OF NO OFFER

RFP #26-09 INSURANCE BROKER FOR BRAZORIA COUNTY

If Respondent is not submitting on the goods and/or services as stated in this RFP, please download and complete this form.

Mail the form to:

Brazoria County Administration Building, Purchasing Department, 237 E. Locust Street, Suite 406, Angleton, Texas 77515.

Or email to: aerickson@brazoriacountytx.gov

NAME OF FIRM: _____

ADDRESS: _____

SIGNATURE: _____

TELEPHONE: _____ DATE: _____

The above has declined to submit a response for the following reason(s) [please check all that apply]:

- Specifications too "restrictive", i.e., goods offered by our company do not meet stated specifications.
- Specifications unclear (please explain below).
- We do not offer this commodity and/or service or an equivalent.
- Insufficient time to respond to the RFP.
- Our schedule would not permit us to perform.
- Cannot meet insurance requirements.

Remarks: _____

BRAZORIA COUNTY

STANDARD TERMS AND CONDITIONS

1. **FUNDING:** Funds for payment have been provided through the Brazoria County budget approved by the Commissioners Court for the current fiscal year only. State of Texas statutes prohibit the obligation and expenditure of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that may arise past the end of the current Brazoria County fiscal year shall be subject to budget approval.
2. **DELIVERY:** Items ordered from this offer may require delivery to various locations throughout Brazoria County, as specified in this offer or at time of order. All delivery and freight charges (F.O.B. Brazoria County designated location) are to be included in the offer price except as noted herein.
3. **AWARD OF CONTRACT:** Brazoria County reserves the right to reject any or all offers, and to select any part or parts thereof without accepting the entire offer. All solicitations may be compared with contracts available to the County through other sources such as Interlocal Agreements and other appropriate sources. Brazoria County may purchase through the source that provides the best value to the County. The successful Respondent will be notified of award as promptly as a thorough analysis of offers will permit, and shall have ten (10) calendar days following date of notification of award in which to supply payment and performance bonds and certificate of insurance as may be required herein.
 - 3.1 Brazoria County hereby notifies Respondents that pursuant to Texas Local Government Code §262.0276 (effective September 1, 2003) Brazoria County is prohibited from entering into a contract or other transaction which requires approval by the Commissioners Court with an individual, sole proprietorship, corporation, non-profit corporation, partnership joint venture, limited corporation or other entity which is indebted to the County. Further, that this Contract may be terminated and payment withheld if awarded Respondent becomes indebted to the County during the term of the Contract.
4. **EQUAL EMPLOYMENT:** All contracts will be awarded by Brazoria County without consideration as to race, religion, sex, national origin or disability of bidder. Successful bidders are required to adhere to the provisions of 42 USCA Sec. 12101 et seq., Americans with Disabilities Act.
5. **CONTRACT:** The Contract consists of the Instructions to Respondents, Specifications/Statement of Work, Standard Terms & Conditions, all well as all other documents included in the Request for Proposal Number 26-09 as stated in the Request for Proposal Package Checklist, and any drawings and other specifications, as well as addenda issued prior to execution of the Contract, other documents listed in the Contract, and modifications issued after execution of the Contract. The Contract represents the entire and integrated agreement between the parties hereto and supersedes prior negotiations, representations, or agreements, either written or oral. No invoices will be paid prior to acceptance of Contract by Brazoria County. No different or additional terms will become a part of this Contract, except as agreed upon by all parties hereto.
6. **INTERLOCAL PARTICIPATION:** It is hereby made a precondition of any offer for a Contract for supplies or services and a part of these specifications, that the submission of any offer in response to this request constitutes an offer made under the same conditions, for the same price, and for the same effective period as this offer, to any other governmental entity having an interlocal agreement with Brazoria County.
 - 6.1 It is further understood, that any other governmental entity that elects to use a Brazoria County semi-annual or annual award will issue its own Contracts or purchase orders and will require separate billing.
7. **DEFAULT OF RESPONDENT:** If successful respondent defaults by failing to supply payment and performance bonds and/or certificate of insurance within the ten (10) day period allotted, award shall pass to the next respondent who provides the best value to Brazoria County upon the approval of Commissioners' Court.
 - 7.1 Respondent, in submitting this offer, agrees that Brazoria County shall not be liable for damages in the event that the County declares the respondent in default.
8. **ADDENDA:** Any interpretations, corrections or changes to these Contract documents and specifications will be made by addenda. Sole issuing authority of addenda shall be vested in the Brazoria County Purchasing Director. Addenda will be mailed to all that are known to have received a copy of the offer package and/or Contract. Respondents shall acknowledge receipt of all addenda.
9. **SALES TAX:** Brazoria County is exempt by law from payment of Texas Sales Tax and Federal Excise Tax.
10. **ETHICAL CONDUCT:** The respondent shall not offer or accept gifts or anything of value, nor enter into any business arrangement with any employee, official, or Director of Brazoria County. No public official shall have interest in this Contract, in accordance with Texas Local Government Code Annotated Title 5, Subtitle C, Chapter 171.

10.1 The Respondent affirms that the only person or parties interested in this offer as principals are those named herein, and that this offer is made without collusion with any other person, firm, or corporation.

11. MINIMUM STANDARDS FOR RESPONSIBLE PROSPECTIVE BIDDERS: A prospective bidder must affirmatively demonstrate bidder's responsibility. A prospective bidder must meet the following requirements:

- 1) Have adequate financial resources, or the ability to obtain such resources as required;
- 2) Be able to comply with the required or proposed delivery schedule;
- 3) Have a satisfactory record of performance;
- 4) Have a satisfactory record of integrity and ethics;
- 5) Be otherwise qualified and eligible to receive an award.

11.1 Brazoria County may request representation and other information sufficient to determine bidder's ability to meet these minimum standards listed above.

12. REFERENCES: During an analysis of all offers, Brazoria County may request Respondent to supply a list of three (3) references to which like services or materials have been supplied by Respondent. If requested, references should include name of firm, address, telephone number and name of representative.

13. INSURANCE: Prior to acceptance of contract by Brazoria County, the successful Respondent must furnish a Certificate of Insurance from an approved insurance carrier for the coverage indicated.

14. SILENCE OF SPECIFICATIONS: The apparent silence of the specifications contained as a part of this package as to any detail or to the apparent omission of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of these specifications shall be made on the basis of this statement.

15. INDEMNIFICATION: The successful Respondent (herein after referred to as Contractor), shall defend, indemnify, and save harmless Brazoria County and all its officers, Directors, officials, agents, and employees from all suits, actions, or other claims of any character, name, and description brought for or on account of any injuries or damages of any negligent act or fault of the Contractor; or on account of or in consequence of any neglect in safeguarding the work; or through use of unacceptable materials in constructing the work; or because of any act of omission, neglect, or misconduct of said Contractor; or because any claims or amount recovered from any infringements of patent, trademark, or copyright; or from any claims or amounts arising recovered under the Worker's Compensation Act, or any other law, ordinance, order, or decree; or of any Director, employee, subcontractor, or supplier in the execution of, or performance under, any Contract which may result from award of bid/offer.

15.1 Further, Contractor indemnifies and will indemnify and save harmless Brazoria County from liability, claim or demand on their part, their Directors, servants, customers, employees, subcontractors, or any employees or agents of subcontractors, whether such liability, claim, or demand arise from event or casualty happening within the job site itself or elsewhere. Contractor shall pay any judgment with costs which may be obtained against Brazoria County growing out of such injury or damages.

15.2 Money due the Contractor under and by virtue of his Contract as may be considered necessary by the County for such purpose may be retained for the use of the County, or in case no money is due, his surety may be held until such suit or suits action or actions, claim or claims for injuries or damages as aforesaid shall have been settled and suitable evidence to the effect furnished to the County, except that money due the Contractor will not be withheld when the Contractor produces satisfactory evidence that he is adequately protected by public liability and property damage insurance.

16. THIRD PARTY BENEFICIARY CLAUSE: It is specifically agreed between the parties executing the Contract that it is not intended by any of the provisions of any part of the Contract to create with the public or any member thereof a third party beneficiary or to authorize anyone not a party to the Contract to maintain a suit for personal injuries or property damage pursuant to the terms or provisions of the Contract.

17. PURCHASE ORDERS REQUIRED: All orders for materials or work must be authenticated by a purchase order issued by the Brazoria County Purchasing Department. Invoices not bearing a purchase order number will not be paid.

18. TESTING: All materials being used in fulfillment of this Contract are subject to inspection or test at any time during their preparation, delivery, or use. At the option of the County Purchasing Director, they may be sampled and tested in order to determine compliance with the governing specifications. Materials not conforming to the requirements of these specifications shall not be used in fulfillment of this Contract with Brazoria County. The County reserves the right to immediately terminate any Contract found not to be in compliance with governing specifications as a result of testing by the County.

19. WAGES: Contractor shall pay or cause to be paid, without cost or expense to Brazoria County, all Social Security, Unemployment and Federal Income Withholding Taxes of all employees; and all such employees shall be paid wages and benefits as required by Federal and/or State law. Contracts involving construction work or supply of materials in place shall abide by the provisions of Article 5159d Texas Revised Civil Statutes Annotated.

20. TERMINATION OF CONTRACT:

Termination with Cause:

“Upon written notice to the Contractor of a defect or breach of this Agreement, Contractor has five (5) business days to cure any defect(s) or breach(es) cited in said notice. If Contractor fails to cure the defect(s) or breach(es) within the five (5) business days allowed, Brazoria County may terminate this Agreement. Nevertheless, Brazoria County reserves the right to provide written notice to the Contractor that this Agreement shall continue if Contractor has in good-faith commenced efforts to cure said defect(s) or breach(es) and Contractor agrees, in writing, to continue to act without undue delay to cure said defect(s) or breach(es).

Termination Without Cause:

This contract may be terminated by either the County or the Contractor at any time, without cause, by providing the other Party at least thirty (30) calendar days’ prior written notice.

21. DELIVERY OF NOTICES: Any notice provided by this Contract (or required by law) to be given to the Contractor by Brazoria County shall be conclusively deemed to have been given and received on the next day after such written notice has been deposited in the mail in Angleton, Texas, by Registered or Certified mail with sufficient postage affixed thereto, addressed to the Contractor at the address so provided; provided this shall not prevent the giving of actual notice in any other manner.

22. DELIVERY TICKETS: Delivery tickets shall accompany each order shipped, and shall show Contractor’s name and address, delivery location, Brazoria County purchase order number and descriptive information as to item and quantity delivered.

23. HAZARDOUS SUBSTANCES: State law requires that shipments of hazardous substances shall include MATERIAL SAFETY DATA SHEETS (MSDS). MSDS must be supplied with the first order shipped under any contract, and at any time MSDS is revised.

24. PAYMENT: Payment shall be made upon receipt and/or acceptance in accordance with the terms of this Contract by the County of items(s) ordered, and receipt of a valid invoice in accordance with Texas Government Code chapter 2251. Contractor is required to pay subcontractors within ten (10) days.

25. CONTRACTOR’S LIABILITY: The Contractor shall be responsible for all damage or injury to property of any character during the execution of the work, resulting from any act, omission, neglect, or misconduct in his manner or method of executing the work, including the Contractor’s agents, employees, subcontractors, and any employees or agents of subcontractors, or at any time due to defective work or materials, and said responsibility will not be released until the project shall have been completed and accepted.

25.1 When or where any direct or indirect damage or injury is done to public or private property by or on account of any act, omission, neglect, or misconduct in the execution of the work, or in consequence of the non-execution thereof by the Contractor, including the Contractor’s agents, employees, subcontractors, and any employees or agents of subcontractors, he shall restore, at his own expense, such property to a condition similar or equal to that existing before such damage or injury was done, by repairing, rebuilding, or otherwise restoring as he may be directed, or he shall make good such damage or injury in an acceptable manner.

26. DEFECTIVE MATERIALS: Unless otherwise stated herein, items supplied under this Contract shall be subject to the County’s approval. Items found defective or not meeting specifications shall be picked up and replaced by the Contractor at the next service day at no expense to the County. If item is not picked up within one (1) week after notification, the item will become a donation to the County for disposition.

27. WARRANTY: Contractor shall warrant that all items and services shall conform to the proposed specifications, all warranties as stated in the Uniform Commercial Code, and be free from all defects in material, workmanship and title. Contractor and the County agree that both parties have all rights, duties, and remedies available as stated in the Uniform Commercial Code. Further, Contractor shall provide additional warranty requirements as defined in the Scope of Work attached. Respondents must provide all warranty terms and conditions in response package.

28. ASSIGNMENT: Contractor shall not sell, assign, transfer or convey this Contract, in whole or in part, without the prior written consent of Brazoria County.

29. GOVERNING LAW: Contractor is advised that these requirements shall be fully governed by the laws of the State of Texas and that Brazoria County may request and rely on advice, decisions and opinions of the Attorney General of Texas and the County Attorney concerning any portion of these requirements. All disputes arising out of this agreement will be resolved in Brazoria County, Texas.

All documents are subject to the Public Information Act requirements.

30. DRAWINGS: All drawings, plans, and specifications are hereby attached and made a part of this Contract.

31. RIGHT TO AUDIT: At any time during the term of this Contract and for a period of four (4) years thereafter, the State of Texas, Brazoria County, and/or other federal, State and local agencies which may have jurisdiction over this contract and/or purchase order, at reasonable times and at its expense reserve the right to audit successful bidder's records and books. If needed for audit, original or independently certified copies of off-site records will be provided to auditors at successful respondent's expense within two (2) weeks of written request.

32. BID BOND: If required by the County, all respondents must submit with bid, a Bid Bond for at least five percent (5%) of the total bid price, if the bid exceeds \$100,000 in Contract price or if the Contract includes construction of public work. Such Bid Bond issued by a surety, acceptable to Brazoria County, authorized to do business in the State of Texas, is a guaranty that the respondent will enter into a contract with Brazoria County (as outlined in the Instructions/Specifications/Statement of Work and attachments) and that offer will furnish the requisite performance and payment bonds as may be required.

33. PERFORMANCE AND PAYMENT BONDS: In the event the total accepted proposal price exceeds \$25,000 the successful respondent must provide to the office of the County Purchasing Director, a payment bond, and if the price exceeds \$100,000 the successful respondent must also provide a performance bond, each in the amount of one hundred percent (100%) of the total contract sum within ten (10) calendar days after receipt of notification of bid/proposal award.

Such bonds shall be executed by a corporate surety or corporate sureties in accordance with Article 7.19-1, Vernon's Texas Insurance Code. Such corporate surety/sureties shall be duly authorized and admitted to do business in the State of Texas and licensed in the State of Texas to issue fidelity and surety bonds with a Best Rating of "A" or better and have a bonding capacity adequate for the prescribed amount. Brazoria County reserves the right to accept or reject any surety company proposed by the respondent. In the event Brazoria County rejects the proposed surety company, the respondent will be afforded five (5) additional days to submit the required bonds issued by a surety company acceptable to Brazoria County.

34. APPLICABLE LAW: All applicable laws and regulations of the State of Texas and ordinances and regulations of Brazoria County shall apply.

35. COMPLIANCE WITH APPLICABLE LAWS: Respondent shall at all times observe and comply with all federal, state, local and municipal ordinances, rules, regulations, relating to the provision of the services contracted to be provided by respondent hereunder or which in any manner affect this Contract.

36. FORCE MAJEURE: Neither the County nor the successful respondent shall be deemed in violation of this Agreement if either is prevented from performing its obligations hereunder for any reason beyond its control, including but not limited to, acts of God, civil or military authority, acts of public enemy, war riots, rebellions, accidents, fires, explosions, earthquakes, floods, or catastrophic failure of public transportation; provided however, that in the event of strikes or labor disputes, an inability to procure raw materials, equipment, power or supplies, or the enactment of any law, order, proclamation, regulation, ordinance, demand, or other requirement of any governmental agency or intergovernmental body, which prevents, restricts, interferes or delays with the performance of this Contract, the party so affected, upon giving notice to the other party, shall be excused from such performance to the extent of such prevention, restriction, delay or interference, so long as the party so affected shall use reasonable efforts under the circumstance to avoid or remove such causes of nonperformance, and shall continue performance hereunder with the utmost dispatch whenever such causes are removed.

37. SEVERABILITY: If any provision of this Contract is held to be unenforceable for any reason, the unenforceability thereof shall not affect any other provision contained herein, and the remainder of the Contract shall remain in full force and effect, and enforceable in accordance with its terms.

38. QUANTITIES: Brazoria County requests purchase prices for the items identified in this offer, and in accordance with the specifications provided herein. The quantities provided are given as a guideline only for the purpose of offer preparation. These quantities shall not be construed as the total number of purchases for the Contract. This estimated figure may increase and/or decrease throughout the year. No guarantee is expressed or implied as to the total quantity of items to be purchased under this Contract.

38.1 Brazoria County reserves the right to add or delete like or related items at any time during the term of this Contract. The additions or deletions shall be incorporated into the contract in the form of an addendum. Additional items shall be priced in accordance with this contract with appropriate discounts being applied.

- 39. PURCHASE FROM OTHER SOURCES:** Brazoria County reserves the right to purchase goods and/or services specified herein, or of equal or like kind, through contracts established by other governmental agencies or thorough separate procurement actions due to the unique or special needs of Brazoria County. Further, the County reserves the right to obtain such goods and/or services from others without penalty or prejudice to the County or the respondent and such action shall not invalidate in whole or in part this Contract or any rights or remedies Brazoria County may have hereunder.
- 40. AGREEMENT TO NOT BOYCOTT ISRAEL:** By agreeing to this Purchase Order [or if no formal agreement, by providing the good(s) / services(s)] the vendor verifies it does not boycott Israel and will not boycott Israel, as defined by Chapter 808 of the Texas Government Code, during the term of this contract [during the time necessary to provide the good(s) / services(s)].
- 41. TEXAS GOVERNMENT CODE 552, SUBCHAPTER J:** Effective January 1, 2020, the requirements of Subchapter J, Chapter 552, Texas Government Code, may apply to this contract and the Contractor agrees that the contract can be terminated if the Contractor knowingly or intentionally fails to comply with a requirement of that subchapter.
- 42. PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES AND EQUIPMENT CERTIFICATION (2 CFR 200.216):** By agreeing to this purchase order (or if no formal agreement, by providing goods/services) the vendor represents and warrants that the equipment, systems, and/or services which it will provide to Brazoria County do not use covered telecommunications equipment or services (as defined in Section 889 John S. McCain National Defense Authorization Act for Fiscal Year 2019 (FY 2019 NDAA), Pub. L. No. 115-232 (2018)) as a substantial or essential component of any system, or as critical technology of any system. Additionally, the vendor represents and warrants that the equipment, systems, and/or services it will provide are not prohibited from being procured using grant funds under section 889 of the FY 2019 NDAA.
- 43. AGREEMENT TO NOT BOYCOTT ENERGY COMPANIES:** By agreeing to this Purchase Order [or if no formal agreement, by providing the good(s) / services(s)] the vendor verifies it does not boycott energy companies and will not boycott energy companies, as defined by Chapter 809 of the Texas Government Code, during the term of this contract [during the time necessary to provide the good(s) / services(s)].
- 44. AGREEMENT TO NOT DISCRIMINATE AGAINST A FIREARM ENTITY OR TRADE ASSOCIATION:** By agreeing to this Purchase Order [or if no formal agreement, by providing the good(s) / services(s)] the vendor verifies it does not discriminate against a firearm entity or trade association and will not discriminate against a firearm entity or trade association, as defined by Chapter 2274 of the Texas Government Code, during the term of this contract [during the time necessary to provide the good(s) / services(s)].
- 45. DEBRIEF, PROTEST AND APPEAL PROCUDURES:** Please see page 20 of 48, section D. of the Brazoria County Policy and Procedure Manual which can be found on the Brazoria County Purchasing Department's "Doing Business" webpage, <https://www.brazoriacountytx.gov/departments/purchasing/doing-business>.
- 46. DISCLOSURE OF INTERESTED PARTIES FORM 1295:** A person or business, who enters into a contract with the County, meeting the conditions according to Texas Local Government Code Sec. 2252.908, is required to file Form 1295 with Texas Ethics Commission. A contract entered into by a governmental entity is voidable for failure to provide the disclosure of interested parties if the entity submits written notice to the business entity of the failure to submit the form and the business entity has not provided the form on, or before, the 10th business day after the business entity receives written notice to submit the Form 1295. **This form is not required unless there is a contract between the vendor and the Brazoria County. Do not submit this form unless you receive an award letter from the County.**

BRAZORIA COUNTY SPECIAL REQUIREMENTS

RESPONDENT INSTRUCTIONS:

READ THIS ENTIRE DOCUMENT CAREFULLY. FOLLOW ALL INSTRUCTIONS. YOU ARE RESPONSIBLE FOR FULFILLING ALL REQUIREMENTS AND SPECIFICATIONS. BE SURE YOU UNDERSTAND THEM.

The following requirements and specifications supersede other requirements where applicable.

General

The requirements set forth below are intended to outline the basic operating parameters and procedures required to provide goods and/or services to Brazoria County as described herein. It is not the intention to describe every item required. In the performance of this Contract, the successful respondent represents it is familiar with the condition under which Brazoria County operates and represents that it has the resources, knowledge and skills to properly support the County's needs consistent with these special conditions and the Contract documents.

The County reserves the right to modify this Contract and Scope of Work as necessary to develop and maintain specifications / statement of work that meets the County's needs. Such modifications shall be mutually agreed upon and shall be incorporated into this Contract as an addendum. Brazoria County shall not be responsible for any additional charge that is not stated in this Contract or mutually agreed to prior to such work or service is performed and/or invoiced.

The Specifications/Statement of Work provided in this package is to be used as a guide in developing an offer to this RFP. The information contained herein is not intended to be restrictive and the County will consider alternate offers submitted by respondent. Alternate offers shall be clearly marked with the proposed alternates and or exceptions to the Specifications/Statement of Work and shall include all pricing/cost advantages if applicable. Respondents are expected to include any additional requirements that may have been inadvertently left out of the attached Specifications/Statement of Work.

All offers inclusive of pricing shall remain firm for acceptance for a period of ninety (90) days from opening date unless otherwise specified by Brazoria County.

Prices offered shall reflect the full Specifications/Statement of Work as defined per the RFP documents, inclusive of all associated costs for insurance, taxes, overhead, profit and bonding, if required and so identified.

Respondent must include all incidental costs in his pricing. Brazoria County will not provide or allow for parking or travel reimbursements for the respondent's employees. Respondent's offices, administration and/or place of business will not be on Brazoria County premises and will be the respondent's responsibility. Only those costs shown on the Pricing/Delivery Sheet and confirmed by a purchase order will be paid.

It is also understood that any and all persons who provide services under Contract to Brazoria County, resulting from this Request for Proposal, shall be and remain employees of the Contractor, not Brazoria County. It is understood and agreed that the respondent is solely responsible for all services being provided and shall provide adequate insurance to cover against any and all losses incurred by the respondent's employees and or equipment during the course of the Contract.

Respondents may be requested to provide presentations, such presentations may develop into negotiating sessions with the successful respondent as selected by the evaluation committee. If Brazoria County and respondent are unable to agree to Contract terms, Brazoria County reserves the right to terminate Contract negotiations with that respondent and enter into negotiations with another respondent.

No award or acquisition can be made until Commissioners Court approves such action.

Brazoria County will not be obligated to the respondent for goods and/or services until completion of a signed Contract as approved by Commissioners Court.

Submission of an offer implies the respondent's acceptance of the evaluation criteria and respondent recognition that subjective judgments must be made by the evaluating committee.

This Request for Proposal in no manner obligates Brazoria County or any of its agencies to the eventual purchase of any goods and/or services described, implied or which may be proposed, until confirmed by a written Contract and purchase order. Progress toward this end is solely at the discretion of Brazoria County and may be terminated at any time prior to the signing of a Contract.

Brazoria County will not be liable for any costs incurred by the respondent in preparing a response to this RFP. Brazoria County makes no guarantee that any goods and/or services will be purchased as a result of this request for proposal, and reserves the right to reject any and all offers. All offers and their accompanying documentation will become the property of Brazoria County. All offers shall be open to negotiation.

All documents will be held by the County and are NOT subject to public view until an award is made. When an award is made, offers are subject to review under the "Public Information Act". To the extent permitted by law, respondents may request in writing non-disclosure of confidential data. Such data shall accompany the offer, be readily separable from the offer and shall be CLEARLY MARKED "CONFIDENTIAL".

All correspondence relating to this RFP, from advertisement to award shall be sent to the Brazoria County Purchasing Department. All presentations and/or meetings between Brazoria County and the respondent relating to this RFP shall be coordinated by the Brazoria County Purchasing Department. Deviations from this requirement may cause the cancellation of this RFP process and/or disqualification of respondent's proposal.

All information provided to respondent for the purpose of submitting a proposal in response to this RFP is confidential, and is and will remain, the property of Brazoria County and will not be used by respondent for any other purposes.

The respondent is expected to examine all documents, forms, specifications, and all instructions. Failure to do so will be at respondent's risk.

The use of liquid paper is **NOT** acceptable and may result in the disqualification of RFP. If an error is made, bidder **MUST** draw a line through the error and initial each change.

Exceptions

Respondent Terms & Conditions are subject to the review and approval of Brazoria County. In the event of conflicting Terms & Conditions, the terms and conditions contained in the solicitation package shall prevail.

Respondent must clearly identify any conflict with terms & conditions by denoting them on the same page where the conflicting terms and conditions appear.

Public Information Act

All responses to this solicitation are in their entirety, subject to the Public Information Act. Brazoria County will respond to open records requests in accordance to law by providing all requested response information unless respondent (respondent) has specifically identified, in the response package, any section or part respondent deems confidential and/or proprietary. Respondent must note and identify such information on the page where such information appears in the same manner as other exceptions.

Late Offer - Electronic Submissions

Once the project closes in Bonfire, Respondents are not able to upload a finalized submission electronically.

Late Offer – Hard Copy Submissions

Hard Copy proposals received in the office of the County Purchasing Director after submission deadline will be considered void and unacceptable. Brazoria County is not responsible for lateness or non-delivery of mail, carrier, etc., and the date/time stamp in the office of the County Purchasing Director shall be the official time of receipt.

Altering Submissions - Electronic

If an error is made after your proposal submission is finalized, click [HERE](#) for instructions. Bonfire allows for respondents to make alterations or amendments and re-submit their submissions before the project closes.

Altering Submissions – Hard Copy

Bids cannot be altered or amended after submission deadline. Any interlineation, alteration, or erasure made before opening time must be initialed by the signer of the bid/offer, guaranteeing authenticity.

Substitutions to Offer

Brazoria County reserves the right to accept any and all or none of the substitutions deemed to be in the best interest of the County.

Withdrawal of Offer

An offer may not be withdrawn or canceled by the respondent without the permission of Brazoria County for a period of ninety (90) days following the date designated for the receipt of bids/offers, and respondent so agrees upon submittal of their bid/offer.

Descriptions

Any reference to model and/or make/manufacturer used in bid/offer specifications or scope of work are descriptive, not restrictive. It is used to indicate the type and quality desired. Bids/Offer on items of like quality will be considered. Offer must provide hardware specifications where hardware is offered.

Terms of Payment

Terms of payment shall be net thirty (30) days from receipt of acceptable invoice and/or acceptance of conforming goods, whichever is later. However, alternate terms will be considered and may be offered. Invoices for installed equipment and software will not be paid prior to complete acceptance by Brazoria County unless otherwise specified. If installation of equipment and software is delayed, the County reserves the right (without extra expense or penalty) to delay a portion of the payment until equipment is installed and functioning properly.

Pricing / Delivery

All items should be priced – FOB Destination Full Freight Allowed, inside delivery. Brazoria County will not pay for any additional transportation and/or shipping charges.

No charges may be billed to the County unless such costs were explicitly included in the proposal. Respondent will incur any costs not explicitly included in the proposal and/or mutually agreed to in writing by the Brazoria County Purchasing Department.

Reduction in Price: If during the life of the contract, the successful bidder's net prices to other customers for items awarded herein are reduced below the contracted price, it is understood and agreed that the benefits of such reduction shall be extended to Brazoria County.

Price Increase: Requests for price adjustments must be solely for the purpose of accommodating an increase in the vendor's cost. A request for a pricing increase will be reviewed by Purchasing Department using the Producer Price Index (PPI) and/or Consumer Price Index (CPI) and any other research available to determine market conditions favorable to the increase. If market conditions dictate an increase to an awarded vendor's cost, the awarded vendor may submit a request to increase pricing no later than thirty (30) days after receiving notice of the County's intent to renew the contract. Requests will only be considered at the time of renewal with written approval from the County. Additionally, the vendor must de-escalate pricing on a previously escalated item, if the decrease is appropriate, due to market conditions.

The request must be in writing and substantiated with supporting documentation (i.e., increase in manufacturers direct cost, etc.). The request shall be addressed to the County Purchasing Director, 237 E. Locust, Suite 406, Angleton, Texas 77515. The request may also be emailed to the Contract Specialist listed in the solicitation. The awarded vendor's past history of honoring contracts at the bid/offer price will be an important consideration in the determination of requested price increase. Brazoria County reserves the right to accept or reject any/all of the requests for price adjustments as it deems to be in the best interest of the County. If rejected, either party may terminate the contract in accordance with the termination provisions of the contract.

Personnel

Successful respondent agrees at all times to maintain an adequate staff of experienced and qualified full time employees to ensure efficient performance under this Agreement. No part-time, subcontract, or third party personnel may perform services hereunder without the prior written consent of the Brazoria County Purchasing Department.

Successful respondent agrees that at all times its employees will perform required services in a professional and workmanlike manner in accordance with good industry practices.

Brazoria County may, at any time, request the removal and replacement of any of successful respondent's employees and the successful respondent will duly consider such request.

Legal Documents

Respondent must submit with its proposal any agreements for services, etc. which may be required by their organization to enter into a Contract with Brazoria County. These agreements must be completed, executed by respondent's authorized representative and submitted with the returned proposal, and are subject to review and amendment by the Brazoria County Attorney's Office, and to approval by Commissioners Court. In the event of conflicting terms, the Brazoria County Terms and Conditions, Statement of Work, and attachments shall prevail.

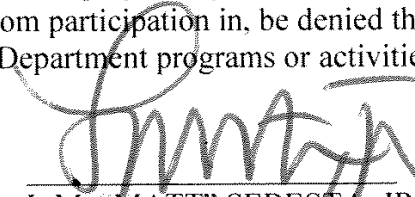
Contract Obligations

This offer, submitted documents and any negotiations, when properly accepted by Brazoria County, shall constitute a Contract equally binding between the successful respondent and Brazoria County. The selected respondent will be considered as the prime Contractor and shall assume responsibility for the goods and/or services. Failure to meet obligations may result in the cancellation of any Contracts.

The respondent's response may be incorporated into any Contract which results from this RFP, therefore, respondents are cautioned not to make claims or statements which they are not prepared to commit to Contractually. Failure by the respondent to meet such claims will result in a requirement that the respondent provide resources necessary to meet submitted claims and/or breach of Contract.

**Title VI and Related Statues
Nondiscrimination Statement**

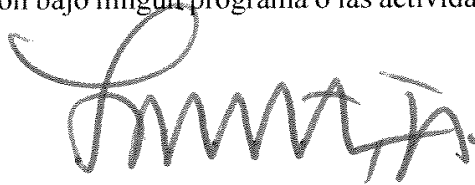
Brazoria County, as a recipient of Federal financial assistance and under Title VI of the Civil Rights Act of 1964 and related statutes, ensures that no person shall on the grounds of race, religion (where the primary objective of the financial assistance is to provide employment per 42 U.S.S. § 2000d-3), color, national origin, sex, age or disability be excluded from participation in, be denied the benefits of, or otherwise be subjected to discrimination under any Department programs or activities.



L.M. "MATT" SEBESTA, JR.
COUNTY JUDGE

**Titulo VI y Estatutos Relacionados
Declaration of No Discriminacion**

Brazoria County, como beneficiario de la asistencia financiera federal y según el Título VI de la Ley de Derechos Civiles de 1964 y los estatutos relacionados, asegura que ninguna persona será excluida por motivos de raza, religión (donde el objetivo principal de la ayuda financiera es proporcionar empleo por 42 USS § 2000d-3), color, origen nacional, sexo, edad o discapacidad de participacion en, o negado los beneficios de, ni será sujeto a discriminación bajo ningún programa o las actividades del Departamento.



L.M. "MATT" SEBESTA, JR.
COUNTY JUDGE

BRAZORIA COUNTY INSURANCE REQUIREMENTS

The following requirements and specifications shall be in addition to the other requirements contained herein and shall supersede the other requirements where applicable.

INSURANCE: Prior to acceptance of contract by Brazoria County, the successful bidder must furnish a Certificate of Insurance together with a receipt showing the time period for which premium has been paid, from an approved insurance carrier for the coverage indicated below.

A. FOR STANDARD PURCHASES CONTRACTS, THE FOLLOWING COVERAGES ARE REQUIRED:

1. Statutory workers compensation in accordance with the State of Texas requirements.
2. Comprehensive general liability including owners and contractors protective liability insurance for bodily injury, death, or property damages in the following amounts:

COVERAGE	PER OCCURRENCE
a. Premises and product liability	\$1,000,000
b. Aggregate policy limits	\$1,000,000

3. Comprehensive automobile and truck liability insurance (covering owned, hired and non-owned vehicles):

COVERAGE	PER OCCURRENCE
a. Bodily injury (including death)	\$1,000,000
b. Property damage	\$1,000,000

Insurance certificates and policy endorsements shall include agreements to hold Commissioners Court of Brazoria County and Brazoria County, Texas harmless; i.e., shall include coverage for "Hold Harmless Agreement".

Failure to maintain insurance coverage as required herein shall be grounds for immediate termination of contract.

All policies must provide, by endorsement to the policy, that thirty (30) days prior written notice of cancellation or material change in coverage be given to the Purchasing Director of Brazoria County. Such insurance when accepted by the County in writing will become acceptable and shall remain unmodified until final acceptance of the work. Coverage provided must be on an occurrence basis.

No policy submitted shall be subject to limitations, conditions, or restrictions deemed inconsistent with the intent of the insurance requirements to be fulfilled by the successful bidder. The decision of Brazoria County thereon is final.

All policies shall be written through a company duly entered and authorized to transact that class of insurance in the State of Texas. Neither approval by Brazoria County of any insurance supplied by the successful bidder, nor a failure to disapprove that insurance, shall relieve the successful bidder of full responsibility of liability, damages and accidents as set forth herein.

No additional payment shall be made for any insurance that the successful bidder may be required to carry.

Certificate Holder information shall be as follows:

Brazoria County
237 E. Locust Street, Suite 401
Angleton, TX 77515

CERTIFICATE OF INTERESTED PARTIES

FORM 1295

Complete Nos. 1 - 4 and 6 if there are interested parties. Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.	OFFICE USE ONLY
1 Name of business entity filing form, and the city, state and country of the business entity's place of business.	
2 Name of governmental entity or state agency that is a party to the contract for which the form is being filed.	

3 Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the services, goods, or other property to be provided under the contract.

4 Name of Interested Party	City, State, Country (place of business)	Nature of Interest (check applicable)	
		Controlling	Intermediary

5 Check only if there is NO Interested Party.

6 UNSWORN DECLARATION

My name is _____, and my date of birth is _____.

My address is _____ (street) _____ (city) _____ (state) _____ (zip code) _____ (country).

I declare under penalty of perjury that the foregoing is true and correct.

Executed in _____ County, State of _____, on the _____ day of _____, 20____.

Signature of authorized agent of contracting business entity
(Declarant)

ADD ADDITIONAL PAGES AS NECESSARY

TEXAS ETHICS COMMISSION RULES

CHAPTER 46. DISCLOSURE OF INTERESTED PARTIES

§ 46.1. Application

- (a) This chapter applies to section 2252.908 of the Government Code
- (b) Section 2252.908 of the Government Code applies only to a contract of a governmental entity or state agency entered into after December 31, 2015, that meets either of the following conditions:
 - (1) the contract requires an action or vote by the governing body of the entity or agency; or
 - (2) The value of the contract is at least \$1 million.
- (c) A contract does not require an action or vote by the governing body of a governmental entity or state agency if:
 - (1) the governing body has legal authority to delegate to its staff the authority to execute the contract
 - (2) The governing body has delegated to its staff the authority to execute the contract; and
 - (3) The governing body does not participate in the selection of the business entity with which the contract is entered into.

§ 46.3. Definitions

- (a) "Contract" means a contract between a governmental entity or state agency and a business entity at the time it is voted on by the governing body or at the time it binds the governmental entity or state agency, whichever is earlier, and includes an amended, extended, or renewed contract.
- (b) "Business entity" includes an entity through which business is conducted with a governmental entity or state agency, regardless of whether the entity is a for-profit or nonprofit entity. The term does not include a governmental entity or state agency.
- (c) "Controlling interest" means: (1) an ownership interest or participating interest in a business entity by virtue of units, percentage, shares, stock, or otherwise that exceeds 10 percent; (2) membership on the board of directors or other governing body of a business entity of which the board or other governing body is composed of not more than 10 members; or (3) service as an officer of a business entity that has four or fewer officers, or service as one of the four officers most highly compensated by a business entity that has more than four officers. Subsection (3) of this section does not apply to an officer of a publicly held business entity or its wholly owned subsidiaries.
- (d) "Interested party" means: (1) a person who has a controlling interest in a business entity with whom a governmental entity or state agency contracts; or (2) an intermediary.
- (e) "Intermediary," for purposes of this rule, means, a person who actively participates in the facilitation of the contract or negotiating the contract, including a broker, adviser, attorney, or representative of or agent for the business entity who:
 - (1) receives compensation from the business entity for the person's participation;
 - (2) communicates directly with the governmental entity or state agency on behalf of the business entity regarding the contract; and
 - (3) is not an employee of the business entity or of an entity with a controlling interest in the business entity.
- (f) "Signed" includes any symbol executed or adopted by a person with present intention to authenticate a writing, including an electronic signature.
- (g) "Value" of a contract is based on the amount of consideration received or to be received by the business entity from the governmental entity or state agency under the contract.

§ 46.4. Changes to Contracts (new rule effective January 1, 2017)

(a) Section 2252.908 of the Government Code does not apply to a change made to an existing contract, including an amendment, change order, or extension of a contract, except as provided by subsections (b) or (c) of this section.

(b) Section 2252.908 of the Government Code applies to a change made to an existing contract, including an amendment, change order, or extension of a contract, if a disclosure of interested parties form was not filed for the existing contract; and either:

- (1) the changed contract requires an action or vote by the governing body of the entity or agency;
or
- (2) the value of the changed contract is at least \$1 million.

(c) Section 2252.908 of the Government Code applies to a change made to an existing contract, including an amendment, change order, or extension of a contract, if the business entity submitted a disclosure of interested parties form to the governmental entity or state agency that is a party to the existing contract; and either:

- (1) there is a change to the disclosure of interested parties; or
- (2) the changed contract requires an action or vote by the governing body of the entity or agency;
or
- (3) the value of the changed contract is at least \$1 million greater than the value of the existing contract.

§ 46.5. Disclosure of Interested Parties Form

(a) A disclosure of interested parties form required by section 2252.908 of the Government Code must be filed on an electronic form prescribed by the commission that contains the following:

- (1) The name of the business entity filing the form and the city, state, and country of the business entity's place of business;
- (2) The name of the governmental entity or state agency that is a party to the contract for which the form is being filed;
- (3) The name of each interested party and the city, state, and country of the place of business of each interested party;
- (4) The identification number used by the governmental entity or state agency to track or identify the contract for which the form is being filed and a short description of the services, goods, or other property used by the governmental entity or state agency provided under the contract; and
- (5) An indication of whether each interested party has a controlling interest in the business entity, is an intermediary in the contract for which the disclosure is being filed, or both.

(b) The certification of filing and the completed disclosure of interested parties form generated by the commission's electronic filing application must be printed, signed by an authorized agent of the contracting business entity, and submitted to the governmental entity or state agency that is the party to the contract for which the form is being filed.

(c) A governmental entity or state agency that receives a completed disclosure of interested parties form and certification of filing shall notify the commission, in an electronic format prescribed by the commission, of the receipt of those documents not later than the 30th day after the date the governmental entity or state agency receives the disclosure.

(d) The commission shall make each disclosure of interested parties form filed with the commission under section 2252.908(f) of the Government Code available to the public on the commission's Internet website not later than the seventh business day after the date the commission receives the notice required under subsection (c) of this section.

****Note:** . A contract entered into by a governmental entity is voidable for failure to provide the disclosure of interested parties if the entity submits written notice to the business entity of the failure to submit the form and the business entity has not provided the form on, or before, the 10th business day after the business entity receives written notice to submit the Form 1295.

Boycott Verification

This verification is required pursuant to Sections 808, 809, 2271, and 2274 (87(R) Senate Bill 13 and 19 versions) of the Texas Government Code:

Definitions:

1. Per Government Code Chapter 808, "Boycott Israel" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made for ordinary business purpose
2. Per Government Code Chapter 809, "Boycott energy company" means, without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company:
 - (A) engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law; or
 - (B) does business with a company described by Paragraph (A)
3. Per Government Code Chapter 2274 (87(R) Senate Bill 19), "Discriminate against a firearm entity or firearm trade association":
 - (A) means, with respect to the entity or association, to:
 - (i) refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association;
 - (ii) refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or
 - (iii) terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association;
4. "Company" has the meaning assigned by Texas Government Code Sections 808.001(2), 809.001(2), and 2274.001(2) (87(R) Senate Bill 19).

This verification is only required for a contract that is between a governmental entity and a company with 10 or more full-time employees; and has a value of \$100,000 or more that is to be paid wholly or partly from public funds of the governmental entity. If your contract value or number of employees does not reach that threshold, please provide a written certification of the contract amount and number of employees.

I, _____ (Person name), the undersigned representative of (Company or Business Name) _____
_____ (hereinafter referred to as Company)

being an adult over the age of eighteen (18) years of age, do hereby depose and verify under oath that the company named-above,

- (A) does not boycott Israel currently;
- (B) will not boycott Israel during the term of the contract the named Company, business or individual with Brazoria County Texas, Texas;
- (C) does not boycott energy companies currently;
- (D) will not boycott energy companies during the term of the contract the named Company, business or individual with Brazoria County, Texas;
- (E) does not boycott a firearm entity of firearm trade association currently; and
- (F) will not boycott a firearm entity of firearm trade association during the term of the contract the named Company, business or individual with Brazoria County, Texas

DATE

SIGNATURE OF COMPANY REPRESENTATIVE

**BRAZORIA COUNTY
RETURN LABEL**

**USE THIS LABEL ONLY IF YOU ARE SUBMITTING A HARD
COPY PROPOSAL SUBMISSION**

SEALED REQUEST FOR PROPOSAL (RFP)

RFP#:	26-09
OPENING DATE:	WEDNESDAY, NOVEMBER 19, 2025
OPENING TIME:	11:00 A.M. LOCAL TIME
RFP DESCRIPTION:	INSURANCE BROKER FOR BRAZORIA COUNTY
RETURN OFFER TO:	PHYSICAL ADDRESS: COUNTY PURCHASING DIRECTOR BRAZORIA COUNTY PURCHASING 237 E. LOCUST STREET, SUITE 406 ANGLETON, TEXAS 77515

DATED MATERIAL – DELIVER IMMEDIATELY

**PLEASE CUT OUT AND AFFIX THE RFP LABEL ABOVE TO THE OUTER
MOST ENVELOPE OF YOUR RESPONSE TO HELP ENSURE PROPER
DELIVERY!**

*******LATE RFP's CANNOT BE ACCEPTED*******