

CBIZ Special Risk Directory

WHO TO CONTACT FOR: CASE STATUS INQUIRIES

| Contact Name | Title / Unit/Department | Role & Responsibilities | Phone / E-mail |
|-----------------------|--|---|--|
| Cean Davis | Assistant Case Manager <i>CBIZ Special Risk</i> | <ul style="list-style-type: none"> Your Resource for Case Status Inquiries | (858) 444-3117 phone (858) 444-3157 fax cbdavis@cbiz.com |
| April Zusman | Assistant Case Manager <i>CBIZ Special Risk</i> <i>New Business</i> | <ul style="list-style-type: none"> Your Resource for Case Status Inquiries | (858) 444-3105 phone (858) 444-3157 fax azusman@cbiz.com |
| Leah Tripp | Case Manager <i>CBIZ Special Risk</i> <i>New Business</i> | <ul style="list-style-type: none"> Case status inquiries. <i>Please ensure Leah is assigned to your case before contacting.</i> | (858) 444-3131 phone (858) 444-3157 fax ltripp@cbiz.com |
| Paula Silva | Case Manager <i>CBIZ Special Risk</i> <i>New Business</i> | <ul style="list-style-type: none"> Case status inquiries. <i>Please ensure Paula is assigned to your case before contacting.</i> | (858) 444-3149 phone (858) 444-3157 fax psilva@cbiz.com |
| Eugene Robles | Case Manager <i>CBIZ Special Risk</i> <i>New Business</i> | <ul style="list-style-type: none"> Case status inquiries. <i>Please ensure Eugene is assigned to your case before contacting.</i> | (858) 444-3146 phone (858) 444-3157 fax erobles@cbiz.com |
| Jeff Wolfle | PA Case Manager-Underwriter <i>CBIZ Special Risk</i> <i>New Business & Underwriting</i> | <ul style="list-style-type: none"> Case status inquiries for CBIZ PA Office. <i>Please ensure Jeff is assigned to your case before contacting.</i> | (858) 444-3108 phone jwolfle@cbiz.com |
| Monica Dockman | Supervisor of New Business <i>CBIZ Special Risk</i> <i>New Business</i> | <ul style="list-style-type: none"> Contact for case questions comments and concerns. Contact for new business process inquiries. | (858) 444-3124 phone (858) 444-3157 fax mdockman@cbiz.com |

WHO TO CONTACT FOR: UNDERWRITING INQUIRIES

| Contact Name | Title / Unit/Department | Role & Responsibilities | Phone / E-mail |
|---------------------|---|--|--|
| Kim Davis | Associate Underwriter <i>CBIZ Special Risk</i> <i>Underwriting</i> | <ul style="list-style-type: none"> An excellent resource for underwriting inquiries and case submission criteria. | (858) 444-3104 phone (858) 444-3157 fax kimdavis@cbiz.com |
| Denise Shook | Sr. Underwriter <i>CBIZ Special Risk</i> <i>Underwriting</i> | <ul style="list-style-type: none"> An excellent resource for underwriting inquiries. | (858) 444-3148 phone (858) 444-3157 fax dshook@cbiz.com |
| Robert Denny | Sr. Underwriter <i>CBIZ Special Risk</i> <i>Underwriting</i> | <ul style="list-style-type: none"> An excellent resource for underwriting inquiries. | (858) 444-3120 phone (858) 444-3157 fax rdenny@cbiz.com |

WHO TO CONTACT FOR: LICENSING, CONTRACTING, COMMISSIONS, AND POS

| Contact Name | Title / Unit/Department | Role & Responsibilities | Phone / E-mail |
|--------------------------|--|---|--|
| Marcus Garcia | Commission Associate <i>CBIZ Special Risk</i> <i>Producer Services</i> | <ul style="list-style-type: none"> Your Commission Accounting Resource | (858) 444-3150 phone (858) 444-3157 fax mgarcia@cbiz.com |
| Loreta Mendigo | Licensing & Contracting Coordinator <i>CBIZ Special Risk</i> <i>Producer Services</i> | <ul style="list-style-type: none"> Your Licensing and Contracting resource | (858) 444-3116 phone (858) 444-3157 fax lmendigo@cbiz.com |
| Aileen Richardson | Licensing & Contracting Coordinator <i>CBIZ Special Risk</i> <i>Producer Services</i> | <ul style="list-style-type: none"> Your Licensing and Contracting resource | (858) 444-3166 phone (858) 444-3157 fax arichardson@cbiz.com |

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|------------------------|--|--|--|
| Jocelyn Ong | POS Assistant Case Manager <i>CBIZ Special Risk Policy Service</i> | <ul style="list-style-type: none"> Your Policy Service General Resource | (858) 444-3168 phone (858) 444-3157 fax jong@cbiz.com |
| Tammy Salyers | POS Case Manager <i>CBIZ Special Risk Policy Service</i> | <ul style="list-style-type: none"> Policy Service Case Manager and General Resource | (858) 444-3132 phone (858) 444-3157 fax tsalyers@cbiz.com |
| Erin Bossemeyer | Supervisor of Producer Services <i>CBIZ Special Risk Producer Services</i> | <ul style="list-style-type: none"> Supervise the direction of & create/revise process for licensing, contracting, commissions, and POS. | (858) 444-3138 phone (858) 444-3157 fax ebossemeyer@cbiz.com |

WHO TO CONTACT FOR: DISCUSSING CASE SUBMISSION CRITERIA SUBMITTING FOR THE FIRST TIME

| Contact Name | Title / Unit/Department | Role & Responsibilities | Phone / E-mail |
|--------------------|---|---|--|
| Adam Perry | Client Relationship Manager <i>CBIZ Special Risk New Business Development</i> | <ul style="list-style-type: none"> <u>Independent Channel</u> Client Relationship Manager and resource | (858) 444-3133 phone (858) 444-3157 fax ajperry@cbiz.com |
| Nathan Dorn | NMFN Relationship Manager <i>CBIZ Special Risk Client Relationships</i> | <ul style="list-style-type: none"> <u>Northwestern Mutual</u> Life Relationship Manager and resource | (858) 444-3160 phone (858) 444-3157 fax ndorn@cbiz.com |
| Kim Davis | Associate Underwriter <i>CBIZ Special Risk Underwriting</i> | <ul style="list-style-type: none"> <u>Allstate</u> resource and Special Risk Underwriter | (858) 444-3104 phone (858) 444-3157 fax kimdavis@cbiz.com |

WHO TO CONTACT FOR: ILLUSTRATIONS, CASE DESIGN

| Contact Name | Title / Unit/Department | Role & Responsibilities | Phone / E-mail |
|---------------------|--|---|--|
| Shauna Winer | Life Product Analyst <i>CBIZ Special Risk Advanced Design Associate</i> | <ul style="list-style-type: none"> Illustrations & Case Design Resource | (858) 444-3115 phone (858) 444-3157 fax swiner@cbiz.com |
| Don Kim | Sr. Life Product Analyst <i>CBIZ Special Risk Advanced Case Design</i> | <ul style="list-style-type: none"> Advanced Illustrations & Case Design Resource | (858) 444-3111 phone (858) 444-3157 fax dkim@cbiz.com |
| Glen Coral | Director, Advanced Planning <i>CBIZ Wealth Management Advance Planning</i> | <ul style="list-style-type: none"> Advanced Illustrations & Case Design Resource | (610) 862-2236 phone (610) 862-2536 fax gcoral@cbiz.com |

WHO TO CONTACT FOR: CASES WITH \$25000+ PREMIUM EXECUTIVE LEADERSHIP

| Contact Name | Title / Unit/Department | Role & Responsibilities | Phone / E-mail |
|-------------------------|---|---|--|
| Emily Reilly | Executive Assistant <i>CBIZ Special Risk</i> | <ul style="list-style-type: none"> Executive Assistant to Timothy Moynihan | (858) 444-3102 phone (858) 444-3157 fax ereilly@cbiz.com |
| Shayne Toby | Director of Operations & New Business <i>CBIZ Insurance Solutions</i> | <ul style="list-style-type: none"> Special Risk Management, Structure and Operations | (858)444-3100 phone (858)444-3157 fax stoby@cbiz.com |
| Timothy Moynihan | President <i>CBIZ Insurance Solutions</i> | <ul style="list-style-type: none"> Executive Decision-maker of Management & All Operations | (858) 444-3118 phone (858) 795-8609 fax tmoynihan@cbiz.com |



WHO TO CONTACT FOR: CRM, PAPERCLIP, VOIP, DAILY OPERATIONS INQUIRIES

| Contact Name | Title / Unit/Department | Role & Responsibilities | Phone / E-mail |
|--------------------|---|--|--|
| Nick Bonomi | Project Manager <i>CBIZ Special Risk Operations</i> | <ul style="list-style-type: none"> Smart Office, Paper Clip and all system related updates / upgrades / CBIZ SR daily operations/Phones | (858) 444-3114 phone (858) 444-3157 fax nbonomi@cbiz.com |

WHO TO CONTACT FOR: GENERAL ACCOUNTING INQUIRIES EXPENSE REPORT, APS PAYMENTS CONTROLS & COMPLIANCE

| Contact Name | Title / Unit/Department | Role & Responsibilities | Phone / E-mail |
|-----------------------|--|---|--|
| Socorro Camas | Accounting Coordinator <i>CBIZ Special Risk Accounting</i> | <ul style="list-style-type: none"> General Accounting responsibilities, accounts receivable, payable, reimbursements, budget, GL | (858) 444-3142 phone (858) 444-3157 fax Scamas@cbiz.com |
| Karen Saunders | Controller CBIZ Wealth Management | <ul style="list-style-type: none"> Business and Financial Compliance. Develop and manage financial control. | (858) 444-3101 ksaunders@cbiz.com |

WHO TO CONTACT FOR: BUSINESS DEVELOPMENT AGENCY CARRIER RELATIONSHIPS BUSINESS ANALYSIS & REPORTING

| Contact Name | Title / Unit/Department | Role & Responsibilities | Phone / E-mail |
|--------------------------------|---|---|--|
| Michael "Woody" Wodchis | Vice President, National Business Development <i>CBIZ Wealth Management</i> | <ul style="list-style-type: none"> Advocate for Wealth Management Consultants relative to strategies, tools and resources to develop revenue | (858)444-3134 phone mwodchis@cbiz.com |
| John Louis-Barrow | Business Analyst & Carrier Relationship Manager <i>CBIZ Wealth Management</i> | <ul style="list-style-type: none"> Business and financial analysis, technical testing. Develop and manage carrier relations. | (858) 444-3106 phone (858) 444-3157 fax jbarrow@cbiz.com |
| Rachel Bruce | Business Development Manager <i>CBIZ Special Risk Business Development</i> | <ul style="list-style-type: none"> Strategic direction and management of the Independent New Business development. | (858) 444-3175 phone (858) 444-3157 fax rbruce@cbiz.com |
| Marilynn Ono | Report Analyst <i>CBIZ Special Risk Operations</i> | <ul style="list-style-type: none"> Smart Office reports, office purchases. | (858) 444-3152 phone (858) 444-3157 fax mono@cbiz.com |

WHO TO CONTACT FOR: AGENCY MARKETING

| Contact Name | Title / Unit/Department | Role & Responsibilities | Phone / E-mail |
|----------------------|---|--|--|
| Matt Leighton | Marketing Manager <i>CBIZ Wealth Management</i> | <ul style="list-style-type: none"> Create and implement marketing direction for | (858) 444-3100 phone (858) 444-3157 fax |



Marketing

CBIZ Special Risk.

mleighton@cbiz.com

CONTACT INFO FOR: DATA ENTRY & INDEXING

| Contact Name | Title / Unit/Department | Role & Responsibilities | Phone / E-mail |
|---------------------------|--|--|--|
| Kryn Shutler | Production Associate <i>CBIZ Special Risk Production</i> | <ul style="list-style-type: none">Incoming / outgoing mail, case initial processing (informals) | (858) 444-3130 phone (858) 444-3157 fax kshutler@cbiz.com |
| Anastasia Syverson | Production Associate <i>CBIZ Special Risk Production</i> | <ul style="list-style-type: none">Incoming / outgoing mail, case initial processing (informals and formal's) | (858) 444-3129 phone (858) 444-3157 fax asyverson@cbiz.com |
| Rayshawn Tabaldo | Production Associate <i>CBIZ Special Risk Production</i> | <ul style="list-style-type: none">Incoming / outgoing mail, case initial processing (formal's) | (858) 444-3136 phone (858) 444-3157 fax rtabaldo@cbiz.com |

CONTACT INFO FOR: HUMAN RESOURCES

| Contact Name | Title / Unit/Department | Role & Responsibilities | Phone / E-mail |
|------------------------|---|--|--|
| Debbie Thompson | Human Resources Director <i>CBIZ B & I Services, Inc. Human Resources</i> | <ul style="list-style-type: none">Talent and performance managementHR Questions, Comments, and Concerns | (858) 795-2040 phone dthompson@cbiz.com |

CONTACT INFO FOR: UNSURE OF WHO TO CONTACT

| Contact Name | Title / Unit/Department | Role & Responsibilities | Phone / E-mail |
|-----------------------|---|---|--|
| Brenda Jackson | Front Desk Administrator <i>CBIZ Special Risk</i> | <ul style="list-style-type: none">Front Desk Resource | (858) 444-3100 phone (858) 444-3157 fax bjackson@cbiz.com |