

## Agenda California Pines Municipal District

### About InterWest

InterWest has 14 offices across Northern California and Nevada. We are a leader among top insurance firms, consistently ranking among the Top 100 Largest and the Top 50 Privately-Held brokerages nationwide. We offer unparalleled expertise in all lines of property and casualty, workers' compensation, employee benefits and personal insurance coverages, as well as surety bonds.

Our philosophy is unique. InterWest operates on the premise that the needs of our clients come first. We believe that our mutual goals are most favorably addressed through an unwavering dedication to remaining part of the fabric of the communities we serve and partnering in the future growth and financial health of our valued clients. Although we operate principally in California, we are licensed to write business in all 50 states and staffed to service clients with locations throughout the nation.

The credentials of InterWest are diverse. Our clients are from numerous industry groups such as agriculture, banking, construction, country clubs, fitness, health care, hospitality, manufacturing, social services, technology, transportation as well as many others. They range in size from sole proprietors to those employing several thousand and paying annual premiums up to several million dollars. Our experience includes the development and management of many group captive programs and self-insured groups, as well as a self-insured JPA.

As a result of the volume of business InterWest manages, we have established very important and extensive relationships in the insurance industry on a countrywide basis. It is these relationships that allow us to offer unique insurance solutions to our clients.

Mike Waltz – Commercial Lines Broker

Dan DiMeo – Director, Property & Casualty Claims

### **SDRMA –Xmod 76 Renewal 7-1-21**

Credits – Getting the most through InterWest and SDRMA Services

- How many credits are you missing? 1 credit equals 1 percent of premium
- 20-21 total premium was 89k
- IW Services Management – Getting the most of available resources
- Alternatives - State Fund (46k) – Allied Public Risk - Glatfelter

### **Looking to the Future /Next Year**

- Gather Training Documentation
- Create Narrative
- Market Options ahead of time for Standard and Alternative Market options.

### **IW Risk Management –**

- Safety Program “Safety 1 on 1”
- On site Physical Inspections/Hazards/ Osha Compliance
- Virtual Coaching
- Risk Management Platform
- Coordination with SDRMA Risk Management

### **IW Claims Management-**

- Catastrophic/Large Loss Claims Guidance & Consultation
- Incident Evaluation & Consultation
- Coverage Denial Review and Advocacy
- Contract Agreement Review
- Customized Claims review – Quarterly
- Alternative Market/ Loss Sensitive Claims Management & Consultation
- Ask the Expert Online Portal

TCOR – Return on Investment

*Written Services Timeline*

### **Next Steps**

- Questions/Feedback
- Cost
- Formal Proposal