



UPA overview

UPA is an MGA specializing in workers' compensation insurance with more than a decade of experience in underwriting.

UPA currently represents A rated carriers and partners with several payroll companies. Our claims management partner Claimetrics manages claims for Chartis and Zurich with proven claims saving results.

- ▶ Chartis - All divisions including Workers' Compensation Specialty division
- ▶ Zurich
- ▶ Amerisafe
- ▶ AmTrust
- ▶ Ace
- ▶ eQBE
- ▶ QBE
- ▶ Liberty Mutual

Industry markets

- ▶ Country clubs
- ▶ Wholesale and retail operations
- ▶ Restaurants with delivery and fast food restaurants
- ▶ Health care
- ▶ Hospitality
- ▶ Transportation
- ▶ Energy
- ▶ Construction
- ▶ Other industries (Industry Eligibility List available at www.UnisourcePA.com)

Benefits of doing business with UPA

- ▶ Unbundled claims with claim representation for Zurich and Chartis (Chartis-Florida claims only)
- ▶ Access to seven A rated carriers
- ▶ Exclusive on certain class codes
- ▶ Ability to write coverage nationwide
- ▶ Ability to write loss sensitive programs including retros and large deductibles
- ▶ Multitude of payment plans including UPAY-As-You-Go option
- ▶ Proven client cost savings through Claimetrics claims handling
- ▶ User friendly Web site and online agent submission platform called UPA e-Access
- ▶ Optimized turnaround time and an ease of doing business
- ▶ New industry standard for agency management system
- ▶ Commitment to developing and leveraging technology to improve integrations with carriers and independent agents



Sign up as an e-Agency

▣ e-Agency:

- Paperless application and real time appointment online
- No premium commitment
- No contract
- File submissions online
- Opportunity to increase commissions based on productivity

UPA history

UPA is well known in Florida as one of the largest wholesalers. UPA's operations and book of business distribution was based primarily in Florida beginning in the mid-90s. Before the significant Florida rate reductions and soft market impacts, UPA had more than \$100 million in written premium.

Under the leadership of CEO Robert Barcum, UPA expanded its footprint to a national level in 2009 and is now licensed in all 50 states. In July 2009, UPA launched its e-Agent program to contract with independent agents nationwide.

As UPA went national, the company acquired Barbara Drollinger in August 2009 and promoted Carol Gonzalez as Vice President of Sales in September 2009. A 20 year industry veteran, Drollinger is one of the top experts in workers' compensation. She was named Vice President of Strategic Relations. Gonzalez is a sales dynamo with eight years in the property and casualty industry.

2010 marks "The Year of the Agent" for UPA in which we will focus on making it easy to doing business.

Mission

UPA's mission is to leverage innovative technology to be the leading source of workers' compensation insurance solutions nationwide for carriers, agents and employers.





Leadership team



Robert L. Barcum, CEO

35 years of extensive sales and executive management experience. Previously served as CEO and President of several IT consulting and software development companies.



Karen Bolinder, VP of Program Operations

20 years experience in worker's compensation. Experienced in policy management including underwriting, policy administration, premium billing, auditing, statistical reporting and accounting.



Carol Gonzalez, VP of Sales

Eight years in property and casualty insurance industry. Experience includes claims management, agency management, underwriting, policy administration, marketing and sales.



Barbara Drollinger, VP of Strategic Relations

A 20-year veteran in workers' compensation. Expert in streamlining insurance operations, underwriting, policy issuance, product development, quality control, premium billing and premium audit.



Sherry Kast, Director of Marketing

20 years experience in marketing, PR and strategic planning. Experience ranges from nonprofit communications to public affairs to marketing at a Fortune 200 company. Garnered 42 awards in marketing and public relations.



David Clausen, IT Strategist

IT veteran with more than 20 years experience in insurance, retail, finance, manufacturing, warehousing and eCommerce. A solution architect, specializing in leveraging IT to meet business goals.

Corporate Office

9701 N Boardwalk Blvd.
Oklahoma City, Oklahoma 73162
Direct 405.728.5116
Fax 405.728.5122

Processing Office

3665 Bee Ridge Road, Suite 214
Sarasota, FL 34233
Direct 941.378.7002
Fax 941.309.7600