BridgePoint
RISK MANAGEMENT

BRIDGEPOINT RISK MANAGEMENT

ROAD MAP AND ADVISOR TEAM

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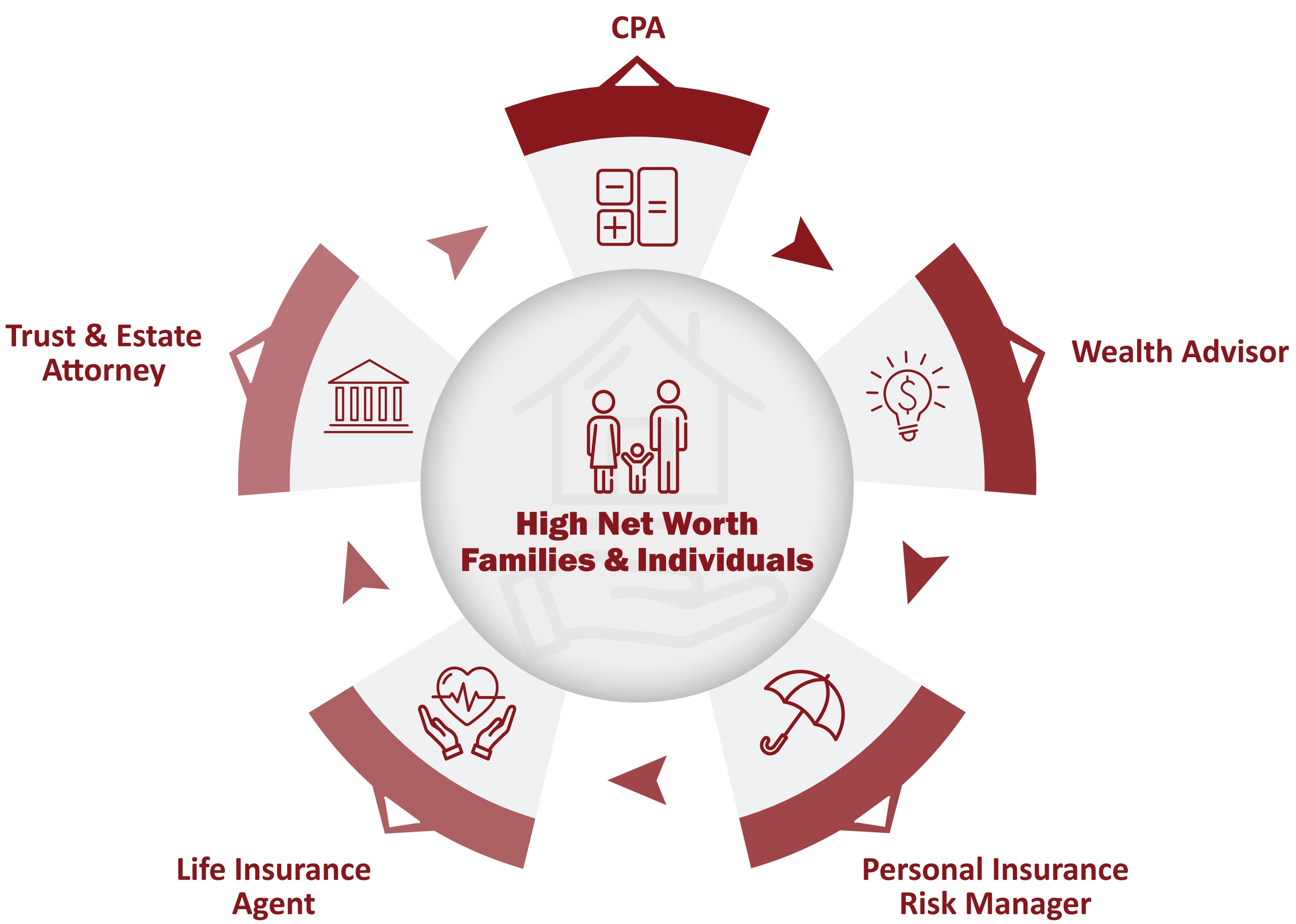


ONE TEAM - WORKING FOR YOU

All parties should work seamlessly to protect, guide, and consult your most important decisions.

As clients engage their team of trusted advisors to grow, preserve and transfer wealth, BridgePoint Risk Management integrates strategies to protect their assets and lifestyles. Our Boutique approach to personal risk management introduces a holistic and consultative discussion that ultimately allows for customized recommendations.

Corporate Office – 203.274.8010
Toll Free – 855.632.2646
www.bridgepointrm.com

ROAD MAP AND ADVISOR TEAM

RISK MANAGEMENT ROAD MAP

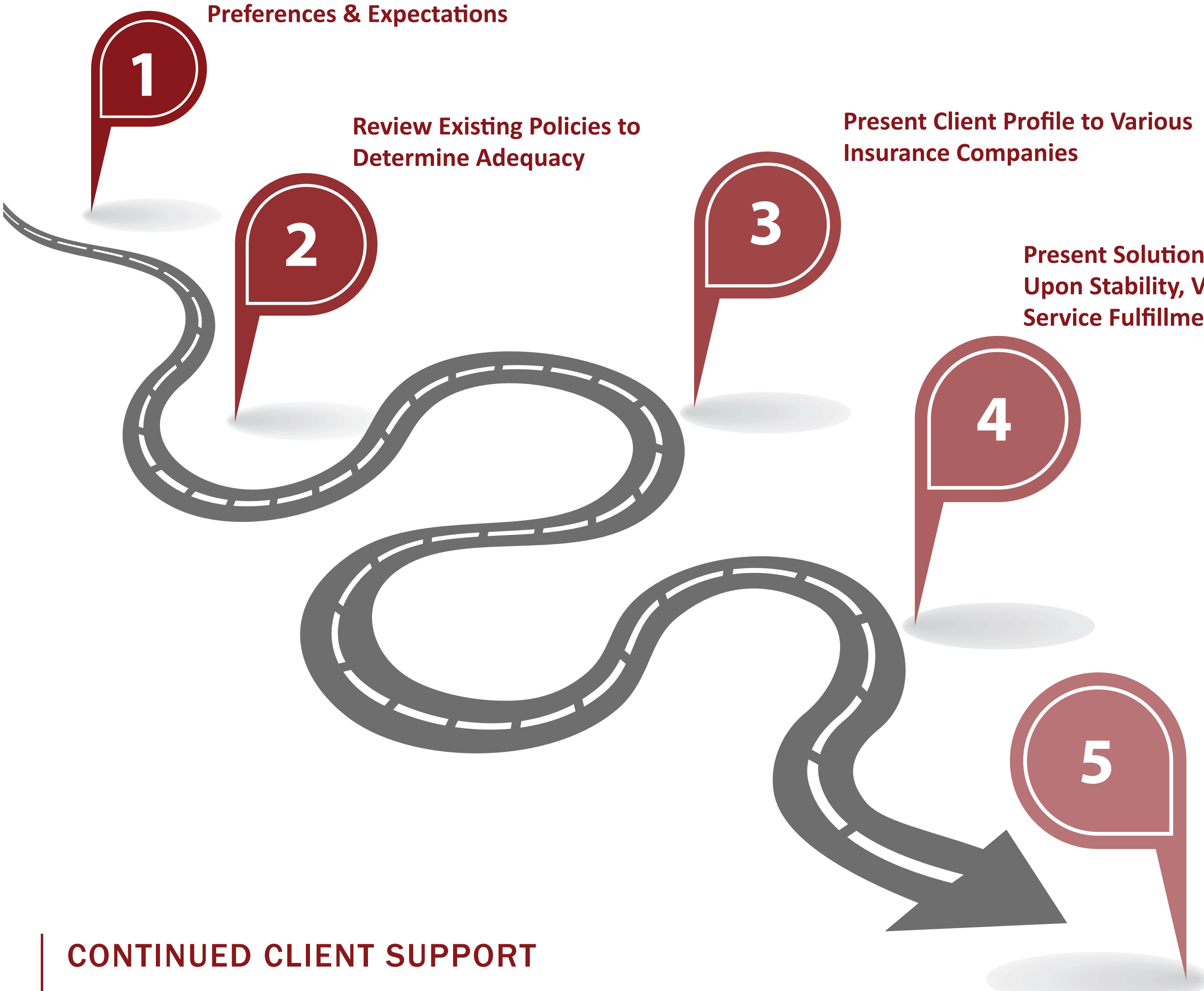
What to expect from an initial consultative insurance review.

Identifying Client's Risk Preferences & Expectations

Review Existing Policies to Determine Adequacy

Present Client Profile to Various Insurance Companies

Present Solutions Based Upon Stability, Value, & Service Fulfillment



Implement Loss Prevention Plan

CONTINUED CLIENT SUPPORT

- Conduct quarterly or annual reviews to identify evolving needs
- Annual market assessments to ensure competitive program
- All BridgePoint Risk Management clients have access to in-house claims support

BUILDING TRUSTED RELATIONSHIPS - BRIDGEPOINT RISK MANAGEMENT

BridgePoint Risk Management's holistic consultative approach helps build trusted relationships with our high-net-worth clients as we meet their unique needs, preferences, and expectations. Our boutique focus and unique relationships with national and regional carriers afford us the opportunity to offer clients a broad spectrum of products that other agencies are simply unable to provide. BridgePoint Risk Management is licensed in all 50 states, allowing us to serve as a common advisor for clients with high-value homes in multiple locations. Our exclusive Personal Risk Analysis focuses on every aspect of a sophisticated lifestyle, allowing us to create personalized insurance programs that protect families, businesses, assets, and lifestyles.

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