



BenefitMall Fact Sheet

- Headquarters: Dallas, TX
- More than 600 employees nationwide
- Offices in 11 states serving 32 markets
- 125 Carrier Partners across the nation
- More than 175,000 in-force groups
- Chief Executive Officer & President: Bernard DiFiore
- www.benefitmall.com

Company Description:

BenefitMall, the leader of integrated employee benefit solutions, provides industry leading technology and a national network of local offices that support the Broker distribution channel. Headquartered in Dallas, Texas and in business for more than 30 years, BenefitMall is the nation's largest general agency offering sales support in 32 U.S. markets serving 11 states. Selling more than \$1 billion in insurance premiums annually through a national network of more than 20,000 independent registered Brokers, BenefitMall offers thousands of plans from more than 125 leading insurance carriers. Service offerings include small group, large group, individual, senior and stop-loss. Additionally, BenefitMall has more than 25 years of experience providing TPA services in the Mid-Atlantic region and integrating benefits administration with FSA, HRA, HSA, COBRA and payroll services. With more than 175,000 in-force groups, BenefitMall supports nearly two million employees and their dependents. For more information, please visit www.benefitmall.com.

Company Proposition:

The right tools to advance your business

Powered by industry leading technology, we provide a wide range of tools from efficient quoting and streamlined case management, to timely industry insights. Our quoting tools provide accurate quotes easily and efficiently. With more than 4,000 quotes processed per week and more than 120,000 quotes processed annually, our web-based systems are backed by advanced technology created around the unique needs of our brokers. All of our cutting-edge tools are supported by experienced people who know how to put them to work for brokers and their clients.

Core services to increase your value

The types of services brokers provide their clients can have an impact

on the success of their business. With BenefitMall, brokers can provide their clients with a variety of tailored service options that meets not one, but all of their needs. Whether it's small or large group, individual, senior or stop loss, our full range of services can be customized to fulfill every part of their business.

Corporate History:

- **Today:** Headquartered in Dallas, Texas with over 600 employees across the country.
- **2011:** Releases a new Broker Workspace where brokers can do everything from view the status of their cases, to access exclusive quoting tools, search for documents, and much more, making it one of the most robust online business centers available in the market today.
- **2010:** Launches BenefitMall Individual Exchange, an online solution designed to help Brokers manage their Individual business.
 - Launches BenefitMall Payroll Exchange in the Mid-Atlantic Region, expanding BenefitMall's role as a Third Party Administrator in this market.
 - BenefitMall acquires NAS Financial Services in Morristown, New Jersey.
- **2008:** BenefitMall acquires BenefitPort Southwest, a full-service General Agency with a division specializing in Senior Products.
- **2006:** BenefitMall acquires Comrisk Insurance, a full service General Agency specializing in stop loss insurance, servicing brokers/consultants and Third Party Administrators.
 - BenefitMall acquires Weston Group Benefits, LLC, one of the fastest growing technology-based insurance and employee distribution networks in the northeast.
 - BenefitMall acquires BenefitPort SouthEast, a founding member of the BenefitPort national network that services agents throughout the state of Florida.
 - BenefitMall partners with Allied Capital Corporation, the largest business development corporation in the US, to enhance core offerings and expand current product lines.
- **2005:** BenefitMall surpasses \$2.0 billion in premiums under management.
- **2001-2004:** BenefitMall surpasses \$1.0 billion in premiums under management.
 - BenefitMall acquires Colorado Group Services, a full-service general agency.

- BenefitMall acquires Group One Source, a national employee benefits marketing organization.
- **2000:** Launches completely re-tooled website providing broader applications and easier access for brokers.
 - BenefitMall acquires two units of The Mather Companies, one of the largest general agencies and third-party administrators of employee benefits programs on the east coast.
- **1999:** CIFS separates from Humana and evolves into an independent, stand-alone company.
 - The company is renamed BenefitMall to better represent the total employee benefit products available to brokers.
 - Acquires several companies, establishing office locations in Georgia, Florida, and New Jersey.
- **1998:** Becomes incorporated in Delaware as Centerstone Holding Corporation with CIFS as a subsidiary.
- **1997:** Launches the first online insurance quote engine.
- **1995:** Humana acquires Emphesys and its related affiliates, including CIFS.
 - CIFS opens its first office outside of California in Denver, Colorado.
- **1994:** Employers health Insurance Company (EHI) of Green Bay, Wisconsin acquires Centerstone Insurance and Financial Services.
- **1993:** Becomes Centerstone Insurance and Financial Services (CIFS) after a series of acquisitions.
- **1991:** Acquires a general agency in California called Multiple Services, Inc.
- **1985:** Launches the first software application capable of producing multi-carrier quotes in real time- an industry breakthrough for brokers.
- **1979:** West Coast Insurance Marketing Corporation is founded in California by a group of insurance professionals.

BenefitMall's Value Statement:

BenefitMall, the leader of integrated employee benefit solutions, provides industry leading technology and a national network of local offices that support the broker distribution channel.

Principles

We provide our superior products and services through BenefitMall's core corporate principles:

Integrity

Acting with honesty, truthfulness and sincerity.

Accountability

Identifying our Brokers' needs and delivering beyond their expectations.

Respect

Treating all individuals with dignity.

Teamwork

Working together to ensure the success of our Brokers, their Customers and BenefitMall through a spirit of cooperation.

Media Contact Information

If you are a member of the press and you have a specific inquiry, please send your requests to:

Laura Clenney
BenefitMall VP of Marketing
Phone: (469) 791-3318
Email: LauraC@benefitmall.com