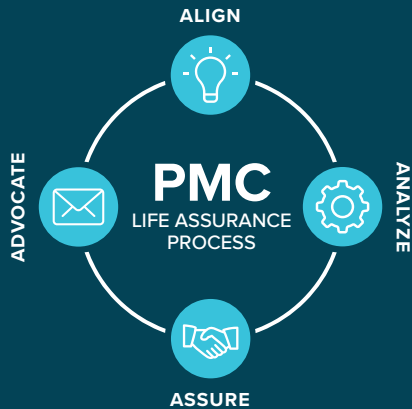




LONG ROAD POLICY MANAGEMENT COMPANY

Active and ongoing policy management solution designed to help ensure policies perform as intended.



Our objective is to make the life insurance experience 10X better for policyholders and advisors.

BRIDGING EXPECTATIONS
WITH RESULTS



DAVID AYERS

Policy Management Specialist

RESEARCH | RESOLVE | FACILITATE

Researches and provides solutions for inforce service requests. Responsible for implementing recalibration recommendations and for managing term policies.

Main contact for:

- Policy service and inforce requests
- Facilitating policy changes to completion
- Term policy reviews and administration



CHRISTI PEDERSON

Policy Management Associate

ORGANIZE | PREPARE | VALIDATE

Works directly with insurance carriers to request and collect accurate policy information. Manages the annual policy review process and new policy setup.

Main contact for:

- Navigating customer service teams
- Policy documents and information
- Status of policy reviews



CLAY KNOKE, CRPC

Policy Management Analyst

ANALYZE | ADVISE | IMPROVE

Reviews and assesses policy performance compared to the design guidelines. Provides recommendations to align the policy with objectives and improve the coverage for clients.

Main contact for:

- Policy analysis and review results
- Solutions for policy issues
- Opportunities to improve current coverage



BEN RYMER, FALU

Policy Management Analyst

ANALYZE | ADVISE | IMPROVE

Reviews and assesses policy performance compared to the design guidelines. Provides recommendations to align the policy with objectives and improve the coverage for clients.

Main contact for:

- Policy analysis and review results
- Solutions for policy issues
- Opportunities to improve current coverage



MICHAEL MICHLITSCH, CRPC, ALMI

Policy Management Company Director

BUILD | GROW | CONSULT

Partners with advisors to leverage the Policy Management Company as a client-centric resource. Dedicated to building the team and enhancing the PMC services.

Main contact for:

- Integrating policy management services
- Discussing unique cases or opportunities
- Expanding client and business relationships



TOM LOVE, CLU, FLMI

VP, Insurance Analytics

GUIDE | CONSULT | DESIGN

Provides additional insurance expertise and a policy design specialty. Consults with the PMC team on complex technical analysis and industry information.

Internal Resource for:

- Carrier and product insights
- Analytical perspective of insurance
- Unique designs and planning strategies