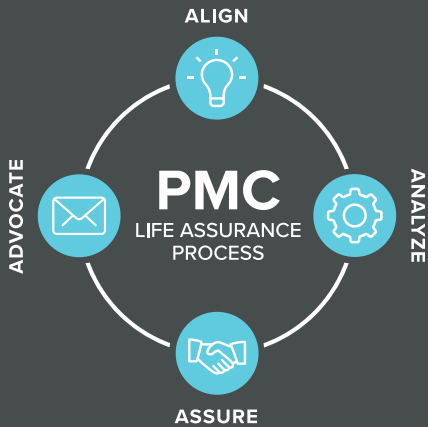




# VALMARK POLICY MANAGEMENT COMPANY

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



BRIDGING EXPECTATIONS  
WITH RESULTS



**CHRIS ANDERSON, ALMI, ACS**

*Policy Management Specialist*

**RESEARCH | RESOLVE | FACILITATE**

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

**Main contact for:**

- Policy service and enforce requests
- Facilitating policy changes to completion
- Term policy reviews and administratioOn



*Policy Management Associates*

**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



**JUSTIN SCHEMA**

*Senior 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**

*VP, InForce Insurance Solutions*

**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



**JENNICA FOSTER**

*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