



Escambia Children's Trust

Response to Request for Proposal
for
**SOLICITATION OF QUALIFICATIONS FOR INSURANCE
AGENT/BROKER SERVICES**

Solicitation Number: ECT 2021-06

October 4, 2021

A subsidiary of
THE BRANCH CO.

702-646-2082

4584 North Rancho Drive, Las Vegas, NV 89130

Table of Contents

Cover Page	1
Transmittal Letter	3
Information Required	5 - 39
Section A	5
Section B.....	6
Section C.....	8
Section D	9
Section E	10
Section F	11
Section G	19
Section H	20
Section I	21
Section J	23
Section K	24
Section L	25
Section M	26
Section N	27
Section O	28

Transmittal Letter

October 4, 2021

Escambia Children's Trust
Attn: Mrs. Carolyn Appleyard, Interim Administrator
C/O Appleyard Agency
4400 Bayou Blvd., #34
Pensacola, FL 32503

Re: In Response to Solicitation for Insurance Agent/Broker Services - Solicitation Number: 2021-06

Dear Mrs. Appleyard:

It is with great pleasure and enthusiasm that Branch Benefits Consultants submits our response to the Escambia Children's Trust's Solicitation for Insurance Agent/Broker Services.

Branch Benefits Consultants shares many of the core values behind the Trust's purpose. The services that we offer and the method in which we deliver those services are in synergistic alignment with the scope of work the Escambia Children's Trust has outlined.

We have a passion for serving – our clients, our partners, the insurance industry, and our community. Investing in and the supporting the community, collaborating with other like-minded entities, educating a variety of stakeholders as well implementing mitigation and prevention strategies are zones of excellence throughout our team.

Our commitment to providing exceptional service, building a team with unmatched professional expertise, cultivating strong industry relationships, and rooting our efforts with a strong company culture is unmatched in the Public Sector space. As a minority owned and operated organization, diversity, inclusion and collaboration are cornerstones of our core values, and we deliver on our passion through our partnerships.

We look forward to building a strong partnership with Escambia Children's Trust.

Sincerely,

A handwritten signature in black ink, appearing to read "Quincy L. Branch".

Quincy L. Branch
President/CEO

Confirmations

Branch Benefits Consultants with Stallworth Insurance Services confirms that we meet or exceed the minimum qualifications outlined in the solicitation.

Branch Benefits Consultants with Stallworth Insurance Services confirms the following required information:

LEGAL NAME

Branch Benefits Consultants

ADDRESS

4584 N. Rancho Dr., Las Vegas, NV 89130

TELEPHONE NUMBER

702-646-2082

EMAIL ADDRESS

gbranch@bbc-ins.com

LEGAL NAME

Stallworth Insurance Services

ADDRESS

1601 N. Pace Blvd., Pensacola, FL 32505

TELEPHONE NUMBER

850-542-4937

EMAIL ADDRESS

Stallworthins1@outlook.com

Branch Benefits Consultants with Stallworth Insurance Services confirms the proposal set forth herein will remain effective for a period of ninety (90) days.

Branch Benefits Consultants with Stallworth Insurance Services confirms that we have complied with the terms, conditions and specifications contained in this solicitation to the best of our knowledge and understanding.

Branch Benefits Consultants with Stallworth Insurance Services confirms that the person signing the letter of transmittal is authorized and his signature is legally binding.

Information Required

A. Description of the firm and its relevant experience, including a statement of the date of establishment or incorporation under the present management structure. Statement describing the full extent of the responding firm's business, including all parent and subsidiary entities.

Branch Benefits Consultants was established in 2011, by Quincy Branch as an S Corporation. Our headquarter office is located at 4584 N. Rancho Dr., Las Vegas, NV 89130. Structurally, the company consists of the following organizations:

- The Branch Company based in Las Vegas, NV (Parent Company)
 - Branch Benefits Consultants based in Las Vegas, NV (Headquarters)
 - Capitol Insurance Services based in Washington, DC
 - Leslie Saunders Insurance Agency based in Tampa, FL
 - The Conley Financial Group based St. Louis, MO
 - Ingram Insurance and Real Estate based in Cheraw, SC

Branch Benefits Consultants provides an array of insurance and non-insurance solutions through a system of full-service independent product offerings that include risk management; insurance placement for commercial, benefits, and personal risks; claims analytics; safety and compliance education/training; legislation briefings; online enrollment and HR support; as well as many other fully customized programs.

We believe that clients benefit when inclusive teams are deployed to deliver top talent working in strategic partnerships on collaborative solutions. Thus, our response and approach upon being awarded the contract will include a secondary, local team, Stallworth Insurance Services, LLC.

Stallworth Insurance Services, LLC was established in 2018, by Tameka Stallworth as a Limited Liability Company. Their office is located at 1601 N. Pace Blvd., Pensacola, FL 32505. This firm is a full-service independent insurance agency specializing in personal, commercial, risk management, employee benefits and financial planning services.

Collectively, our team and operations combine hundreds of years of experience. This allows us to think globally and act locally to deliver leading-edge products and solutions, exceptional service and value to our customers and strategic partners. These solutions and programs are installed throughout the country in a variety of industries with practice areas in transportation/aviation, public/municipality entities, hospitality, and large private sector operations.

B. Description of the firm's experience performing the type of services requested in this Solicitation, including description of current and recent arrangements with other clients for which similar services are performed.

We currently provide, or have provided in the past, the type of services requested in this solicitation.

Our current and past client list includes the following organizations:

- Avis Budget Group
- United Medical Center
- Station Casinos
- City of North Las Vegas
- Airport Minority Advisory Council (AMAC)
- MGM Resorts International/City Center/Bellagio
- NV Energy

Our demonstrated experience as the agent/broker for United Medical Center (an instrumentality of the District of Columbia) includes:

- Annual loss control, inspection, and placement of property coverage with total insured values of over \$545 Million
- Competitive oversight of the procurement of Directors & Officers Liability, General & Professional Liability, Excess Liability, Cyber Liability, Commercial Auto Liability, Workers Compensation, Employed Lawyers Liability, Pollution Liability, and Crime despite changing market conditions and negative loss development
- Assistance in the creation of benchmarking for frequency and severity, trend identification, risk mitigation program design and implementation assistance for all lines of coverage
- Worked closely with various stakeholders to perform extensive revisions and enhancements to insurance provisions utilized by UMC in TPA and legal service agreements
- Advised staff on multiple issues involving risk transfer, coverage requirements and limits of coverage in agreements between UMC and its vendors/service providers
- Provided expertise in analyzing coverage and claims

Our demonstrated experience as the agent/broker for the City of North Las Vegas includes:

- Annual loss control, inspection, and placement of property coverage with total insured values of over \$623 Million
- Competitive oversight of the procurement of Public Entity Liability, Excess Liability, Workers Compensation, Event Liability and Crime despite changing market conditions and negative loss development
- Assistance in the creation of benchmarking for frequency and severity, trend identification, risk mitigation program design and implementation assistance for all lines of coverage
- Advised staff on multiple issues involving risk transfer, coverage requirements and limits of coverage in agreements between UMC and its vendors/service providers
- Provided expertise in analyzing coverage and claims

Our demonstrated experience as the agent/broker Airport Minority Advisory Council (AMAC) includes:

- Provided counsel and expertise to all airport and food concessionaires regarding creation, implementation, and monitoring of insurance and risk management programs
- Formed and installed exclusive association specific programs for the mutual benefit of the association and its members
- Produced educational programming for a variety of stakeholders on general business concepts, insurance programs, and risk management best practices

- Designed and assisted in the implementation of various supplier/vendor diversity initiatives through out the association and its membership

C. Description of the firm's understanding of the ECT's insurance and risk management needs.

As a new special tax district, it is critical to the long-term success as well as the responsible stewardship of the organization that you have a partner with Enterprise Risk Management expertise, the capacity to help you build an effective risk management program from the ground up and the required skillset to navigate the complexities of government funded, public entities.

The Trust will need to continuously evolve as it goes from conception to full implementation and continues to maturation. Further, the Trust will need to simultaneously respond to a constantly changing system of emerging risks and fluctuating marketplaces. We are committed to helping you understand and plan for the unique risk management challenges your organization faces, both now and in the future.

Escambia Children's Trust is at risk for future losses from:

- Economic uncertainty
- Catastrophic and severe weather-related incidents such as rising temperatures/dangerously hot days, flooding, as well as hurricanes and other storm surges
- Social inflation in litigation surrounding sexual abuse and molestation claims
- Ransomware and other cyber attacks
- Contractual liability litigation from third-party vendor management
- Terrorism
- Pollution and other environments incidents
- Active shooter events

In addition, the COVID-19 pandemic continues to threaten public safety and impact all of the perils listed above.

As your risk management consultant, we will work as an extension of your team. Through collaboration and leveraging our combined knowledge and skills, the Trust will benefit from a strong cohesive team with the capacity to develop creative and powerful solutions that fit your needs.

D. Description of the firm's approach to providing the types of services sought by the ECT.

Our integrated risk management approach seeks to view the risks facing the entire organization through the lens of Total Cost of Risk. This integrated approach looks at both real and possible expenses in the structure of your program, the financing of your insurance premiums, the identification and mitigation of any uninsured or uninsurable losses, the identification and mitigation of coverage gaps, as well as through the analysis of contractual liability.

We offer solutions for a wide range of special projects and ongoing service needs including (but not limits to):

- Risk management, insurance, design, administration, review, implementation, monitoring and auditing
- Study of major contractual relationships with insurers, contractors, vendors and other key documents
- Qualification and quantification of the Total Cost of Risk (TCOR)
- Evaluation of exposures and determination of what risks could be retained and what risks should be insured
- Analysis of loss runs to determine if trends and root causes can be identified and offer suggested risk management procedures to address identified areas of concern
- Delivery of service by means of a hands-on approach with customization to the Trust's needs
- Assistance in preparing annual reports and ensuring availability of our team for routine consultations/meetings/research
- Examination of premium billings, audits, policy changes
- Preparation of summaries of available insurance and non-insurance protections for various audiences and stakeholders
- Service as counselors and thought leaders to the Trust's risk management team when called upon
- Pro-active consultation on major industry developments, trends, and emerging risks
- Review of exposures, policies as issued, coverage adequacy, as well as compliance with insurance and indemnity contractual requirements
- Supplying coverage knowledge, opinions and recommendations on current, prospective and contractual requirements
- Risk assessment, transfer and financing recommendations
- Best practice and implementation suggestions following legislative and regulatory changes
- Assistance in development of submissions, supporting underwriting information, and specifications used to negotiate and place insurance and reinsurance contracts
- Delivering financial strength assessments of insurers, risk retention and purchasing groups as well as captive insurers

It is our goal to help the Trust properly analyze, select, and customize effective risk management programs that balance the Trust's stewardship of funds as well as prudently controls operating costs so that the assets of the Trust are protected from loss, theft or misuse.

E. Description of the software and analytic capabilities of the firm.

The analysis of various exposures and their impact on the organization is critical to identifying, controlling, financing, and administering the Escambia Children's Trust's risks. Employing both qualitative and quantitative methods will help the Trust:

- Prioritize risk factors
- Validate and refine loss data
- Identify root causes
- Review insurance program structure
- Evaluate the viability of various retention and/or deductible programs and levels
- Determine the appropriateness of coverage purchase
- Inform insurance purchasing decision
- Select suitable limits of liability

To accomplish this analysis, as well as to comply with strict governance, it will be important for Escambia Children's Trust to invest in their own Risk Management Information System (RMIS) to track risk exposure, protection measures and relevant insurance policy information.

We recognize that as a new organization there may be budgetary concerns that prevent the investment in a RMIS immediately. As your partner, we use leading-edge technology to provide our clients with the latest data analysis, as well as legislative, communication and human resources administration tools. These tools include standard templates used for Enterprise Risk Management that can be customized to fit the needs of the Trust with Microsoft Excel as a starting point.

F. Identification of the proposed insurance and risk management team, including the principal-in-charge who will have overall responsibility for the direction and supervision of the team, and a description of the responsibilities of each team member. Provide short biographies of team members describing at a minimum education, professional experience, and credentials.

Your service team consists of the following key individuals:

PRINCIPAL-IN-CHARGE

Quincy Branch, President/CEO
Branch Benefits Consultants
4584 N. Rancho Dr.
Las Vegas, NV 89130
702-646-2082 X 204
qbranch@bbc-ins.com
www.branchbenefitsconsultants.com

LOCAL CONTACT

Meka Stallworth, Owner
Stallworth Insurance Services
1601 N. Pace Blvd.
Pensacola, FL 32505
850-542-4937
Stallworthins1@outlook.com
www.stallworthins2.com

SVP BUSINESS DEVELOPMENT

Aubrey Branch
4584 N. Rancho Dr.
Las Vegas, NV 89130
702-646-2082 X 201
abbranch@bbc-ins.com

RISK MANAGEMENT / SERVICE CONTACT

Rachael Rizzi, VP of Risk Management
Branch Benefits Consultants
4584 N. Rancho Dr.
Las Vegas, NV 89130
702-646-2082 X 222
rrizzi@bbc-ins.com

We understand that people bring their entire selves to work and leverage the ways in which our staffs' cultures, backgrounds, experiences and personalities make them think differently. At Branch Benefits Consultants, we foster a "people first" culture and invest in relationships within and outside of our organization. Our commitment to providing one exceptional experience for our clients is delivered by operation with a one vision, one team mindset.

QUINCY L. BRANCH, RHU, EHBA

4584 N. Rancho Dr. | Las Vegas, NV 89130 | 702-646-2082 |
qbranch@bbc-ins.com

Education

UNIVERSITY OF NEVADA, LAS VEGAS, Las Vegas, NV
B.A., Business Administration, May 2000

THE AMERICAN COLLEGE, Bryn Mawr, PA
RHU, Registered Health Underwriter Designation, 2008

AMERICA'S HEALTH INSURANCE PLANS, Washington, DC
EHBA, Employee Healthcare Benefits Associates, 2010

Experience

BRANCH BENEFITS CONSULTANTS, Las Vegas, NV
President/CEO, July 2011 to Present

AC, LLC/TASTY IMAGE, Las Vegas, NV
Managing Member, December 2010 to Present

BRANCH-HERNANDEZ & ASSOCIATES INSURANCE SERVICES, Las Vegas, NV
Vice President of Employee Benefits, October 2004 to January 2012

UNITY SANITARY SUPPLY, INC., Las Vegas, NV
President/COO, August 1999 to September 2004

ABC INSURANCE AGENCY, Las Vegas, NV
Operations Manager, May 1998 to August 1999

ENTERPRISE RENT-A-CAR, Las Vegas, NV
Management Trainee, March 1995 to April 1998

Licensing/Credentials

Licensed Insurance Agent – Property, Casualty, Life & Health – 2002 to Present

Current and/or Prior States: AL, AZ, CA, CO, DC, FL, GA, LA, MA, MD, MI, MN, MO, MS, MT, NC, NJ, NM, NV, NY, OH, OK, OR, SC, SD, TN, TX, UT, VA, WA, WI, WV

Professional Memberships

NATIONAL/FEDERAL

- Federal Advisory Committee on Insurance, Presidential Appointee 2017 to Present
- National African-American Insurance Association, Member/Chairman 2014 to Present
- National Association of Health Underwriters – Member 2000 to Present
- Independent Insurance Agents & Brokers of America – Government Affairs Committee Member 2018 to Present
- Independent Insurance Agents & Brokers of America – Young Agents Committee Member/Chair 2011 to 2015

LOCAL/STATE

- Nevada Independent Insurance Agents Association, Board Member 2011 to Present
- Silver State Health Exchange, Board Member 2017 to Present
- Clark County Association of Health Underwriters, Member 2000 to Present
- Nevada Insurance Commission Advisory Council, Appointed Member 2014 to 2016

Community Involvement

- Quiet Storm Foundation, Board Member 2014 to Present
- Las Vegas-Clark County Urban League Young Professionals, Member 2015 to 2018
- Urban Chamber of Commerce, Board Member 2011 to 2013
- Northwest Junior Basketball League, Coach 2004 to Present
- Mountaintop Faith Ministries, Deacon/Board Member 2006 to Present
- Clark County School District, Shadow Ridge Freshman Boys Basketball Coach 2005 to 2007

Awards/Honors

- 2021 Sidney O. Smith Award, Independent Insurance Agents & Brokers of America
- 2015 Achievement of the Year, Large Vision Business Networking Mixer
- 2015 Hot 100, Insurance Business America
- 2014 Young Guns, Insurance Business America
- 2013 Person of the Year, Nevada Independent Insurance Agents Association
- 2013 Top Rising Stars in Advising, Employee Benefits Advisor
- 2013 40 Under 40, Vegas, Inc.
- 2012 Young Agent of the Year, Nevada Independent Insurance Agents Association

MEKA STALLWORTH

1601 N. Pace Blvd. | Pensacola, FL 32505 | 850-542-4937 |
stallworthins21@outlook.com

Education

TROY UNIVERSITY NAS PENSACOLA, Pensacola, FL
A.A., Business Administration and Computer Science, 2002

OVERTON-LEE & ASSOCIATES SCHOOL OF INSURANCE, Pensacola, FL
Life, Health & Variable Annuities Certification, Completed 2006

Experience

STALLWORTH NSURANCE SERVICES, Pensacola, FL
Owner, 2019 to Present

DIRECT GENERAL AUTO INSURANCE, Pensacola, FL
Agency Manager, 2006 to 2019

JACKSON HEWITT TAX SERVICES, Pensacola, FL
Certified Tax Preparer, 2007 to 2010

AMERICAN GENERAL LIFE & ACCIDENT INSURANCE, Pensacola, FL
Producer, 2005 to 2006

Licensing/Credentials

Licensed Insurance Agent – Property, Casualty, Life & Health – 2015 to Present

Current and/or Prior States: AL, FL

Commissioned Notary – 2016 to Present

Current and/or Prior States: FL

Professional Memberships

- American Association of Notaries, Member 2010 to Present
- Association for Independent Insurance Agents, Member 2019 to Present

Community Involvement

- Powerful Women of the Gulf Coast, Member 2019 to Present
- Pensacola Chamber of Commerce, Member 2019 to Present
- We Luv Kids, Volunteer 2019

AUBREY BRANCH

4584 N. Rancho Dr. | Las Vegas, NV 89130 | 702-646-2082 |
abbranch@bbc-ins.com

Education

Cal State Dominguez Hills University, Carson, CA
B.S., Business Administration - Management, 1981

Experience

BRANCH BENEFITS CONSULTANTS, Las Vegas, NV
Chairman/Visionary, July 2011 to Present

BRANCH HERNANDEZ CONSULTING, Las Vegas, NV
Chairman/CEO, 2013 to Present

AC, LLC/TASTY IMAGE, Las Vegas, NV
Member, December 2010 to Present

BRANCH-HERNANDEZ & ASSOCIATES INSURANCE SERVICES, Las Vegas, NV
Chairman/CEO, 1999 to 2013

BRANCH, OLSON & HERNANDEZ INSURANCE AGENCY, Las Vegas, NV
CEO, 1999 to 2005

ABC INSURANCE AGENCY, Las Vegas, NV
President, 1997 to 2007

PRUDENTIAL INSURANCE, Las Vegas, NV
Agent, 1995 to 1997

Licensing/Credentials

Licensed Insurance Agent – Property, Casualty, Life & Health – 1990 to Present

Current and/or Prior States: CA, DC, LA, MA, MD, MI, NV, NY

Professional Memberships

NATIONAL/FEDERAL

- National Association of Minority Contractors, Board Member 2013 to Present
- National African-American Insurance Association, Member/Chairman 2010 to Present
- Independent Insurance Agents & Brokers of America, Committee Member 2011 to Present
- Airport Minority Advisory Committee, Member 2013 to Present

LOCAL/STATE

- Governor's Workforce Investment Board for Tourism, Gaming and Entertainment Sector Council, Appointed Member 2011 to 2019
- City of North Las Vegas, Committee Member 2008 to Present
- Nevada Insurance Commission Advisory Council, Appointed Member 2010 to 2012

Community Involvement

- North Las Vegas Rotary Club, Member/Board Member 2004 to Present
- Mountaintop Faith Ministries, Member/Board Member 2001 to Present

Awards/Honors

- 2019 Vendor of the Year, The American Gaming Association & MGM Resorts International

RACHAEL RIZZI, CSRM, CISR

4584 N. Rancho Dr. | Las Vegas, NV 89130 | 702-646-2082 |
rrizzi@bbc-ins.com

Education

GRAND CANYON UNIVERSITY, Phoenix, AZ

Masters, Business Administration -Servant Leadership Emphasis, 2012

UNIVERSITY OF NEVADA, LAS VEGAS, Las Vegas, NV

B.A., Psychology, 2004

UNIVERSITY OF NEVADA, LAS VEGAS, Las Vegas, NV

B.A., Criminal Justice, 2004

THE NATIONAL ALLIANCE FOR INSURANCE EDUCATION & RESEARCH, Dallas, TX

CRM, Certified Risk Manager Designation, 2021 – Present

THE NATIONAL ALLIANCE FOR INSURANCE EDUCATION & RESEARCH, Dallas, TX

CSRM, Certified School Risk Manager Designation, Earned 2011

THE NATIONAL ALLIANCE FOR INSURANCE EDUCATION & RESEARCH, Dallas, TX

CISR, Certified Insurance Service Representative, Earned 2006

Experience

BRANCH BENEFITS CONSULTANTS, Las Vegas, NV

Vice President of Risk Management, January 2021 to Present

CAPITOL INSURANCE SERVICES, Las Vegas, NV

Vice President of Risk Management, September 2020 to Present

INFINITE RIZZDOM, LLC Las Vegas, NV

Managing Member, October 2020 to Present

THE BRANCH COMPANY, Las Vegas, NV

Vice Sales & Marketing, April 2019 to December 2020

BLUE LOTUS INSURANCE BROKER, INC., Las Vegas, NV

President/Founder, October 2014 to April 2020

ORGILL SINGER & ASSOCIATES, Las Vegas, NV

Commercial Insurance Broker, November 2005 to October 2014

ABSOLUTE INSURANCE SERVICES INC., Las Vegas, NV

Commercial Lines Customer Service Representative, January 2005 to November 2005

BROWN & BROWN INSURANCE, Las Vegas, NV

Account Administrator, May 2002 to December 2004

ASSURANCE LTD., Las Vegas, NV

Insurance Tech, November 2001 to May 2002

Licensing/Credentials

Licensed Insurance Agent – Property, Casualty, Life & Health – 2005 to Present

Licensed Surplus Lines Broker – Property & Casualty – 2014 to Present

Current and/or Prior States: CA, DC, MD, NV, VA, WA

Professional Memberships

NATIONAL/FEDERAL

- Independent Insurance Agents & Brokers of America – Member 2011 to Present

LOCAL/STATE

- Nevada Independent Insurance Agents Association, Board Member 2010 to Present
- Nevada Insurance Commission Advisory Council, Appointed Member 2019 to Present

Community Involvement

- Women's Research Institute of Nevada, Member/Board Member 2014 to Present
- Richard H Bryan Elementary School Organization Team, Board Member 2018 to Present
- HeartMath Certified Trainer, Mentor, Facilitator & Coach, 2020 to Present
- Trauma Invention Programs, Inc., Volunteer 1999 to 2001

Awards/Honors

- 2012 Best Young Agents, American Agent & Broker Magazine
- 2011 Tom Foerster Memorial Scholarship
- 2011 Young Agent of the Year, Nevada Independent Insurance Agents Association

Professional Publications

- Story Feature, IA Magazine, 2019
- Guest Columnist/Story Feature, American Agent & Broker Magazine, 2012 & 2013
- Guest Columnist, Nevada Nonprofit News, to 2011 to 2012
- Guest Columnist/Story Feature, Property Casualty 360, 2012
- Guest Columnist, Las Vegas Business Press, 2010

G. Identification of the legal team(s) under contract to provide services in various disciplines.

Branch Benefits Consultants retains the services of

John Benedict, Esq.

Law Offices of John Benedict

2190 E. Pebble Rd. Suite 260

Las Vegas, NV 89123

Phone 702-333-3770

Fax 702-361-3685

to provide services to our office in various disciplines.

Stallworth Insurance Services agrees, in execution of this contract, to defer all legal matters to the Branch Benefits Consultants counsel.

H. ECT and Company must agree upon the legal firm for any employment disputes covered by any proposal award.

Branch Benefits Consultants with Stallworth Insurance Services confirms that the legal firm for any employment disputes covered by any proposal award is to be agreed upon by Escambia Children's Trust as well as the appropriate insurer. No legal services will be provided directly by Branch Benefits Consultants. All legal services to be provided through the benefits, terms and conditions listed in the applicable policy(ies).

I. Three (3) references of clients or other public entities that are familiar with the work of your firm in providing services of the type requested by the ECT with current contact information for each reference, and three (3) references of persons familiar with the work and professional skill of the proposed principal-in-charge. The references for the firm and the principal-in-charge may, but need not, be the same.

Client/Public Entity References

UNITED MEDICAL CENTER

Michael Austin, Attorney
Office of the General Counsel
1310 Southern Ave. SE
Washington, DC 20032
202-941-9396
miaustin@united-medicalcenter.com
www.united-medicalcenter.com

MGM RESORTS INTERNATIONAL

Matt Morrison, Executive Director of
Healthcare Operations
980 Kelly Johnson Dr., Ste 100
Las Vegas, NV 89119
702-692-1916
mmorrison@mgmresorts.com
www.mgmresorts.com

CEDAR TREE ACADEMY

Dr. Latonya Henderson, CEO
701 Howard Rd SE
Washington, DC 20020
202-610-2845
lhenderson@cedartree-dc.org
www.cedartree-dc.org

Professional References – Quincy Branch

SHAUNDELL NEWSOME

Sumnu Marketing
1951 Stella Lake St., Ste 7
Las Vegas, NV 89106
702-562-6397
shaundell@sumnumarketing.com
www.sumnumarketing.com

MATTHEW FERAN

Sun Life
One Sun Life Executive Park
Wellesley Hills, MA 02481
781-690-9731
Matthew.feran@sunlife.com
www.sunlife.com

BOB RUSBULDT

Independent Insurance Agents & Brokers of
America
127 S. Peyton St.
Alexandria, VA 22314
703-706-5386
bob.rusbuldt@iiaba.net

Professional References – Tameka Stallworth

JAMES PRINCE, JR.

Enterprise Holdings
6300 Pensacola Blvd.
Pensacola, FL 32505
678-675-7012
James.u.prince@ehi.com
www.ehi.com

TERI BROWN

MGA Insurance Company, Inc.
3333 Lee Parkway, Ste 1200
Dallas, TX 75219-5134
813-217-3308
Teri.brown@gainsco.com
www.gainsco.com

J. Identification of any material litigation, administrative proceedings or investigations regarding your firm or team member that is ongoing or has been settled or otherwise concluded during the past two years. Identification of any conflict of interest related to this proposal.

Branch Benefits Consultants with Stallworth Insurance Services confirms that there ARE NO current, pending or past material litigation, administrative proceedings or investigations regarding our firm or team members that are ongoing or have been settled or otherwise concluded during the past two years.

Branch Benefits Consultants with Stallworth Insurance Services confirms that there are no conflicts of interest related to this proposal to the best of our knowledge and understanding.

K. All responses must include, if Respondent is incorporated, identification of the firm's state of incorporation and a statement that it is in good standing in that state, and, if the state of incorporation is not Florida, a statement that the Respondent has complied with all filing requirements of that state.

Branch Benefits Consultants is incorporated in the state of Nevada and possess a Certificate of Existence With Status In Good Standing issued by the Nevada Secretary of State. Upon successful award of this solicitation a copy evidencing the same will be supplied to Escambia Children's Trust.

Branch Benefits Consultants, and the principal-in-charge are both duly licensed in the state of Florida by the Florida Department of Financial Services, Division of Insurance Agent and Agency Services. Upon successful award of this solicitation a copy evidencing the same will be supplied to Escambia Children's Trust.

Stallworth Insurance Services is incorporated in the state of Florida and possess a Certificate of Status issued by the Florida Division of Corporations. Upon successful award of this solicitation a copy evidencing the same will be supplied to Escambia Children's Trust.

Stallworth Insurance Services, and the owner are both duly licensed in the state of Florida by the Florida Department of Financial Services, Division of Insurance Agent and Agency Services. Upon successful award of this solicitation a copy evidencing the same will be supplied to Escambia Children's Trust.

L. All responses must include any termination of contracts by any municipality with cause or due to failure to provide proper service to any municipality.

Branch Benefits Consultants with Stallworth Insurance Services confirms that there ARE NO current, pending or past termination of contracts by any municipality with cause or due to failure to provide proper service to any municipality.

M. All responses must include a diversity and inclusion statement.

Diversity and Inclusion Statement – Branch Benefits Consultants

Branch Benefits Consultants is MBE and ACDBE certified. Since its formation, Branch Benefits Consultants, and all related entities, have been 100% minority owned and operated. Our company has and continues to embody diversity throughout our staff, operations, and customer base. Both male and female minorities are represented in positions of leadership and management.

It is important that as a minority owned company, we also create opportunities for other businesses in our community. Since inception we have utilized partnerships with local firms in the areas of financing, legal services, marketing, cleaning services and many other vendors. These relationships contribute significantly to our growth as well as the growth of all residents and businesses locally. Branch Benefits Consultants has committed to allocate over 40% of our corporate expenses to be contracted with vendors and companies that are minority, women or veteran owned with shared values of increasing the prosperity in all our partnerships.

Diversity and Inclusion Statement – Stallworth Insurance Services

Stallworth does not actively hold any certifications at the present moment, however since its formation, Stallworth Insurance Services has been 100% minority and female owned and operated. Their company has and continues to deliver on its commitment to building an inclusive, varied workplace. They recognize, value and seek out a staff that is diverse and inclusive in every way.

The team that will be assigned to advise the Trust will consist of 4 people from both firms, all of whom are minorities (African American and/or female).

N. All responses must disclose whether any payouts or percentages are anticipated to be paid from the carrier to the agent/broker as part of the arrangement.

Payment to agents/brokers for the procurement of an entity's insurance program is typically accomplished in one of three ways – fee for service, commission paid by the carrier to the agent/broker, or a combination of both.

Fee for service models work best when a municipality has a staff and/or network of vendors that provide comprehensive risk management, third party administration, and actuarial analysis as well as a RMIS in place.

Given that Escambia Children's Trust is a new special tax district, without the infrastructure in place to perform the tasks listed above or a RMIS, our recommendation for the initial design and implementation of the insurance program is to use a commission, not to exceed 10%, paid by the carrier to us. A 10% commission is usual and customary when placing most insurance coverages. The only exception to the 10% would be for any bonds placed on behalf of the trust. Usual and customary bond commission ranges from 10% - 40%. Our commission for bonds will not exceed 25%.

This strategy finances the placement of insurance without additional fees to our firm while providing financial stability for both the Trust budget and our firm as we work collaboratively to build the insurance and risk management programs from the ground up.

O. Forms

The following required documents have been completed and are attached via pages 28 - 38:

- Attachment A – Escambia Children’s Trust Vendor Questionnaire
- Attachment B – Information Sheet for Transactions and Conveyances Corporate Identification
- Attachment C – Conflict/Non-Conflict of Interest Statement
- Attachment D – Certification Regarding E-Verify System
- Attachment E – Equal Employment Opportunity Statement
- Attachment F – Statement on Public Entity Crimes
- Attachment G – Drug-Free Workplace Form
- Attachment H – Acknowledgement of Addenda Insurance Agent/Broker Services
- Attachment I – Signature Sheet

ATTACHMENT A

Escambia Children's Trust Vendor Questionnaire

Additional space may be required. Please answer questions in the order presented. All questions must be answered or Respondent may be disqualified.

1. Has your company ever been denied insurance or had insurance canceled? No
2. Is your company bondable? Has your company ever been denied bond? If yes, explain.
Yes. We do not currently have any contracts that require us to carry a bond, however our financial position is strong enough to do so if required.
3. Can your insurance company produce a certificate of insurance stating your limits and naming Escambia Children's Trust as an Additional Insured? Yes
4. Is your company in any stage of bankruptcy, including initial filing? No
5. Has your company been disbarred by the Federal Government or any State or Local Government? No
6. How many employees does your company have?
Staff Employees: Full Time 24 Part Time 1
Contract Employees: Full Time 0 Part Time 0

ATTACHMENT B

Information Sheet for Transactions and Conveyances Corporate Identification

(Page 1 of 2)

The following information will be provided to the attorney for Escambia Children's Trust for incorporation in legal documents. It is, therefore, vital that all information is accurate and complete. Please be certain that all spelling, capitalization, etc. is exactly as registered with the state or Federal Government.

Is this a Florida Corporation: (Please Circle One)
Yes or No

If not a Florida Corporation:

In what state was it created: NV

Name as spelled in that state: Branch Benefits Consultants

What kind of corporation is it: "For Profit" or "Not for Profit"

Is it in good standing: Yes or No

Authorized to transact business in Florida: Yes or No

State of Florida Department of State Certificate of Authority Document Number:

Does it use a registered fictitious name: Yes or No

Names of Officers:

President: Quincy Branch

Secretary: Quincy Branch

Vice President: _____

Treasurer: Quincy Branch

Director: Quincy Branch

Director: _____

Other: _____

Other: _____

Name of Corporation (As Used in Florida) Branch Benefits Consultants

(Spelled Exactly as it is Registered with the state or Federal Government)

Corporate Address:

Post Office Box: 4584 N. Rancho Dr.

ECT, State, Zip: Las Vegas, NV 89130

Street Address: 4584 N. Rancho Dr.

ECT, State, Zip: Las Vegas, NV 89130

(Please provide both the Post Office Box and street address for mail and/or express delivery; also for recorded instruments involving land.)

Please complete this form on the following page.

**Information Sheet for Transactions and Conveyances
Corporate Identification
(Page 2 of 2)**

Federal Identification Number: 45-2627429

(For all instruments to be recorded, taxpayer's identification is needed.)

Contact Person for Company: Quincy Branch

E-Mail: qbranch@bbc-ins.com

Telephone: 702-646-2082

Facsimile: 702-646-2082

Name of Individual Who Will Sign the Instrument on Behalf of the Company:

Quincy L. Branch

Upon Certification of Award, Contract shall be signed by the President or Vice President. Any other officer shall have permission to sign via a resolution approved by the Board of Directors on behalf of the company. Awarded Contractor shall submit a copy of the resolution together with the executed Contract to the Office of Purchasing.

(Spelled exactly as it would appear on the instrument.)

Title of the Individual Named Above Who Will Sign on Behalf of the Company:

END

Verified by: _____

Date: _____

ATTACHMENT C

CONFLICT/NON-CONFLICT OF INTEREST STATEMENT

CHECK ONE

☒ To the best of our knowledge, the undersigned firm has no potential conflict of interest due to any other clients, contracts, or property interest for this project.

OR

☐ The undersigned firm, **BY ATTACHMENT TO THIS FORM**, submits information which may be a potential conflict of interest due to other clients, contracts, or property interest for this project.

LITIGATION STATEMENT

CHECK ONE

☒ The undersigned firm has had no litigation and/or judgments entered against it by any local, state or federal entity and has had no litigation and/or judgments entered against such entities during the past ten (10) years.

☐ The undersigned firm, **BY ATTACHMENT TO THIS FORM**, submits a summary and disposition of individual cases of litigation and/or judgments entered by or against any local, state or federal entity, by any state or federal court, during the past ten (10) years.

Branch Benefits Consultants

COMPANY NAME



AUTHORIZED SIGNATURE

Quincy L. Branch

NAME (PRINT OR TYPE)

President/CEO

TITLE

Failure to check the appropriate blocks above may result in disqualification of your proposal. Likewise, failure to provide documentation of a possible conflict of interest, or a summary of past litigation and/or judgments, may result in disqualification of your proposal.

ATTACHMENT D

Certification Regarding E-Verify System

Pursuant to §448.095, Florida Statutes, the Contractor hereby certifies the following: Contractor shall register with and utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of all new employees hired by Contractor during the term of this Agreement and shall expressly require any subcontractors performing work or providing services pursuant to this Agreement to likewise utilize the E-Verify System to verify the employment eligibility of all new employees hired by the subcontractor during the term of this Agreement. If Contractor enters into a contract with a subcontractor performing work or providing services on its behalf, Contractor shall also require the subcontractor to provide an affidavit stating that the subcontractor does not employ, contract with, or subcontract with an unauthorized alien. Failure to comply with these requirements shall be cause for immediate termination of the Agreement.


In the event performance of this Agreement is or will be funded using state or federal funds, the Contractor hereby further certifies compliance with the following:

Contractor shall register with and utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of individuals to work in the United States and 48 C.F.R. 52.222-54 is incorporated herein by reference. If applicable, in accordance with Subpart 22.18 of the Federal Acquisition Register, the Contractor must (1) enroll in the E-Verify Program, (2) use E-Verify to verify the employment eligibility of all new hires working in the United States; (3) use E-Verify to verify the employment eligibility of all employees assigned to perform work pursuant to the Agreement; and (4) include these requirements in any related subcontracts. Failure to comply with these requirements shall be cause for immediate termination of the Agreement.

CONTRACTOR:

Branch Benefits Consultants

Business Name

By: 

Signature

Name: Quincy L. Branch

Printed

Title: President/CEO

Printed

Date: 10/4/2021

ATTACHMENT E

EQUAL EMPLOYMENT OPPORTUNITY STATEMENT

The undersigned Respondent, by the signature below, represents that the foregoing information is true and correct. The undersigned Respondent, by the signature below, provides assurances to the Escambia Children's Trust of its compliance with Federal, State and local affirmative action and equal employment opportunity requirements. The undersigned Respondent further assures that it and its sub-contractors/sub-recipients facilities are accessible to the handicapped (if applicable).

IN WITNESS WHEREOF, this Equal Employment Opportunity Statement is hereby signed as of the date indicated.

RESPONDENT: Branch Benefits Consultants

Quincy L. Branch

Typed name of person signing above

President/CEO

Title of person signing above

ATTEST BY:



Authorized Signature signed in ink before a
Notary Public

Witness

Witness


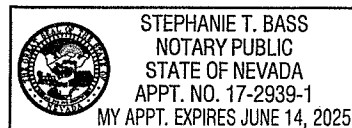
Date signed: 10/4/2021

Notary Public, State of

Nevada

My commission expires:

June 14, 2025


10.4.2021

ATTACHMENT F

STATEMENT ON PUBLIC ENTITY CRIMES

In accordance with Florida Statute 287.133, the following information is provided:

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a Proposal on a Contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Florida Statute 287.017 for CATEGORY TWO for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

COMPANY: Branch Benefits Consultants

NAME: Quincy L. Branch

TITLE: President/CEO

DATE: 10/4/2021

ATTACHMENT G

DRUG-FREE WORKPLACE FORM

The undersigned vendor, in accordance with Florida Statute 287.087
hereby certifies that

Branch Benefits Consultants does:

Name of Business

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, employee assistance programs and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under proposal a copy of the statement specified in Paragraph 1.
4. In the statement specified in Paragraph 1, notify the employees that, as a condition of working on the commodities or contractual services that are under proposal, the employee will adhere to the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Florida Statute 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of Paragraphs 1 thru 5.

As the person authorized to sign this statement, I certify that this firm complies fully with above requirements.



Respondent's Signature

10/4/2021

Date

ATTACHMENT H

ACKNOWLEDGEMENT OF ADDENDA **INSURANCE AGENT/BROKER SERVICES**

The Respondent shall acknowledge receipt of any addenda issued to the solicitation by completing the blocks below and including it in the proposal. Failure to acknowledge an addendum that has a material impact on the solicitation may negatively impact the responsiveness of your proposal. Material impacts included but are not limited to changes with specifications, scope of work, delivery time, performance period, bonds, letters of credit, insurance, qualifications, etc.

Addendum Number	Date	Signature

To our knowledge there have not been any addenda issued to the solicitation. We did request and received a copy of the "TRIM Budget" as well as answers to other questions on 10/3/2021.



10/4/2021

ATTACHMENT I

SIGNATURE SHEET

PROPOSAL NO. ECT 2021-06

The undersigned, as Vendor, does declare that no other persons other than the Vendor herein named has any interest in this proposal or in the contract to be taken, and that it is made without any connection with any other person or persons making a proposal for the same articles, and it is in all respects fair and without collusion or fraud. The undersigned further declares that he has carefully examined the specifications and is thoroughly familiar with their provisions and penalties.

The Vendor proposes and agrees that, if this proposal is accepted, to contract with the Escambia Children's Trust, in the form of contract specified, to furnish all the material, equipment, machinery, tools, apparatus, labor, means of transportation (including freight costs) necessary to provide:

Insurance Agent/Broker Services for Escambia Children's Trust

Legal Name of Firm: Branch Benefits Consultants

Address: 4584 N. Rancho Dr.

City: Las Vegas State: NV Zip: 89130

Signature: 

Name (type/print): Quincy Branch

Title: President/CEO

Telephone: 702-646-2082 Fax No.: 702-646-2082 Date: 10/4/2021

Email Address qbranch@bbc-ins.com

**To receive consideration for award,
this signature sheet must be returned as part of your response.**