



Positive Energy in a Risky World™



WE'RE INVESTING ALL OF OUR ENERGY IN YOU. LET'S SHINE, TOGETHER.

Established in 2005, SUNZ Insurance Company was founded to serve PEOs, staffing agencies, and large companies. We rise to the challenge each day to incite positive solutions and excellent service to our clients. It is this energy and passion within us that drives our mantra to focus on you, our client. It's a risky world, but we will shine light daily on our industry as dedicated practitioners that strive to exude a unique and transparent level of professionalism, setting new standards and increasing your highest expectations.

We have a combined 120+ years of experience in the industry, and we understand the need to provide workers' compensation insurance options that do not start and end with the policy alone. The people of SUNZ have a skill for providing policyholders with workers' compensation solutions that are unique to individual needs, setting us above the competition.

Our personalized service and flexibility in customizing all financial aspects of your program allow you to maximize cash flow while effectively balancing the risk and reward of your workers' compensation program.

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EVERY BUSINESS FACES UNIQUE RISKS.

In a risky world, SUNZ provides the most powerful, flexible, and unique solutions across the industry, providing positive energy over business uncertainties.

Workers' Compensation

At SUNZ, we excel working one-on-one with policyholders and brokers to personalize service and offer a customized workers' compensation program to satisfy unique needs and risk tolerances.

Our flexibility in customizing premiums, collateral accumulation, and deposits allow clients to maximize their cash flow while effectively balancing the risk and reward of their workers' compensation program.

With our nationwide coverage and expanded state licensing rated A- by AM best, the possibilities are endless.

Our approach means we are here for you from start to finish, sunrise to sunset, 365 days a year, anytime and anywhere

Safety & Loss Prevention

We help you manage your risks. With SUNZ, maintaining a safer working environment equals lower cost for you

Claims Management

Our affiliate company, Next Level Administrators, has all the tools you need to analyze your claims history and use it to reach your goals.

Claim Cost Containment

We provide you with an ensemble of tools to control claims costs before, during, and after claims occur. Let us help you design a program that works for you.

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SEE WHAT CHARGES OUR TEAM MEMBERS THE MOST!

From our employees to our clients, SUNZ connects us all with powerful possibilities. Our company is led by an experienced and positively charged executive team dedicated to maintaining our core values and meeting your needs to their fullest potential.



Steven F. Herrig,
Chief Executive Officer



Rick Leonard
President



Theodore G. Bryant
Chief Legal Officer



Jeffrey Marshall
Chief Financial Officer



Karen A. Bolinder
Chief Operating Officer



David Brodsky
Chief Underwriting Officer



John Sells
Chief Information Officer



Glen Distefano
Chief Information Security Officer



Blake Souers
Director of Program Development

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OUR UNIVERSE OF SOLUTIONS.

SUNZ Insurance continues to rise to the occasion by leading the industry in workers' compensation insurance for PEOs, staffing agencies, and large corporations. Our workers' compensation insurance is not just a part of our business. That is how SUNZ has the energy to give you the individual attention and support other companies just cannot offer.

SUNZ's workers' compensation programs can provide both guaranteed cost and large deductible programs starting at a minimum of \$100K. SUNZ works one-on-one with policyholders to personalize service and offer a customized program to satisfy unique needs and risk tolerances.

Our flexibility in customizing collateral accumulation and deposits allows clients to grow their cash flow while effectively balancing the risk and reward of their workers' compensation program. Let SUNZ help you take control of your risks and get your company on track toward a safer tomorrow. We are here for you whenever you need us because, unlike other insurance carriers, your success is what drives us from sunrise to sunset.

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OUR PROACTIVE, POSITIVE CLAIMS PARTNERSHIP

Our claims partner, **Next Level Administrators** (NLA), is a performance-based company that is an advocate for our clients.

NLA is a full-service workers' compensation claims and program administration firm that provides integrated insurance services to carriers, program managers, captives, and self-insured employers.

NLA's data and service-driven culture helps each client create a goal-oriented workers' compensation claims program that returns employees to work quickly and safely while reducing workers' compensation claim costs.

Claims Administration - A proactive claims management approach.

NLA sets goals at the beginning of the partnership, then monitors and measures them daily so that everyone – adjusters, supervisors, account managers, and vendors – can work together to achieve the same outcome. The claims team works by your side to realize improved medical outcomes, have employees return to work faster, and consistently achieve lower overall claim costs.

The proactive claims approach includes:

- **Low Caseload** – By keeping caseloads low, the claims team has time for important and productive collaboration with everyone involved in the claim.
- **Accountability** – Fostering a culture of accountability inspires everyone on the team to develop long-term relationships, to be bold with their abilities to manage claims, and to achieve established goals without the client monitoring us.
- **Data-Driven** – With critical claims data at their fingertips, the claims team monitors, measures, and consistently finds ways to elevate the outcome of a claim through E3VA, our visual analytics platform.

Using data to provide actionable insights, NLA will empower you to plan, execute, and drive consistently improved results to achieve organizational goals.



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Overview of the Company

SUNZ Insurance is a national workers' compensation insurance company headquartered in Bradenton, Florida and develops unique workers' compensation programs that deliver innovative and tailored solutions to protect businesses and their employees. SUNZ understands it's client's need for fluidity, offering workers' compensation insurance options that do not begin and end with the printed policy. SUNZ believes that a safe work environment and healthy workforce are the foundation for a successful business.

History of the Company

Founded in 2005, SUNZ Insurance was established with the objective to help PEOs, staffing agencies, and large companies develop, implement, and manage workers' compensation plans tailored to each clients' unique needs.

Leadership Team

- Steven F. Herrig - Chief Executive Officer
- Rick Leonard - President
- Theodore G. Bryant - Chief Legal Officer
- Jeffrey Marshall - Chief Financial Officer
- Karen A. Bolinder - Chief Operating Officer
- David Brodsky - Chief Underwriting Officer
- John Sells - Chief Information Officer
- Glen Distefano - Chief Information Security Officer
- Blake Souers - Director of Program Development

Services

SUNZ helps companies manage their risks and maintain a safer working environment, which equals lower costs for them.

SUNZ provides workers' compensation solutions to Professional Employer Organizations, staffing agencies, transportation companies and large corporations.

SUNZ provides policyholders with a comprehensive 24/7 web-based Risk Management Center to proactively manage workers' compensation risks. This promotes injury prevention, best practices, regulatory compliance, and ultimately lowers clients' insurance costs.

SUNZ also has a network of affiliate companies that provide additional services to help its clients manage and control risk-reducing losses through a comprehensive 360-degree approach to all issues that might arise with a workers' compensation case. This includes claims management, fraud investigation, and subrogation services.

Social Media



SUNZ Insurance Solutions

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NEWS RELEASE

For immediate Release

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SUNZ Insurance Expands into 12 New States

Bradenton, FLA (April 8, 2022) – SUNZ Insurance President Rick Leonard announced this week at NAPEO’s Risk Management Workshop, the largest gathering of PEO risk management professionals, that SUNZ Insurance Company has confirmed expansion into 12 new states.

SUNZ Insurance expanded its licensing footprint into Alaska, California, Connecticut, the District of Columbia, Illinois, Maryland, Massachusetts, Michigan, Minnesota, Nebraska, Pennsylvania, and Rhode Island.

With the addition of these new states, SUNZ is now licensed to offer workers’ compensation policies on a direct basis in 41 states. Although SUNZ already offers customized workers’ compensation insurance coverage nationwide through its fronting partnership, this latest expansion marks the next step in the organization’s strategic growth.

“Our team is experienced, proactive, and predictive as we develop, implement, and manage personalized workers’ compensation plans tailored to each client’s unique needs and unique geographic requirements. We look forward to connecting with new businesses across these additional states to help make every workplace safer for employees,” Leonard said.

Since 2005, SUNZ Insurance has provided nationwide ‘A-rated’ coverage to PEOs, staffing agencies, transportation companies, and large employers. SUNZ’s foundation is providing high deductible workers’ compensation coverage utilizing its proprietary technology-driven platform which, year over year, continues to generate significantly better results for its clientele. It is this simple combination of expertise plus technology that SUNZ’s clients continue to see unprecedented growth year over year.

About SUNZ Insurance

SUNZ Holdings, LLC is the parent company of SUNZ Insurance, a national workers’ compensation insurance company headquartered in Bradenton, Florida. There are several affiliate companies within the SUNZ Holdings enterprise that provide related and ancillary services to the workers compensation insurance industry. These companies include Next Level Administrators, WatchPoint, Avalon Subrogation Partners, and Ascential Care Partners. For more information, visit www.sunzinsurance.com.

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AM Best Affirms Credit Ratings of SUNZ Insurance Company

Bradenton, Fla., August 18, 2022 — SUNZ Insurance CEO Steve F. Herrig announced today that AM Best affirmed the Financial Strength Rating of “A-” (Excellent) and a Long-Term Issuer Credit Rating of “a-” (Excellent) to SUNZ Insurance Company. The outlook of these Credit Ratings (ratings) is stable.

The ratings reflect SUNZ Insurance Company’s balance sheet strength, operating performance, business profile and enterprise risk management. The rating actions are affirmed amidst the expansion of SUNZ’s footprint to 42 states and offers customized workers’ compensation insurance coverage nationwide through its fronting partnership. SUNZ continues to maintain its position as one of the leading providers of large deductible workers’ compensation coverage, with a specialization in PEO & Staffing companies, Transportation, and other Large Employers.

For more information on SUNZ Insurance, please visit www.sunzinsurance.com.

About SUNZ Insurance

SUNZ Insurance is a national workers’ compensation insurance company headquartered in Bradenton, Florida and develops unique workers’ compensation programs that deliver innovative and tailored solutions to protect businesses and their employees. SUNZ understands its clients’ need for fluidity, offering workers’ compensation insurance options that do not begin and end with the printed policy. SUNZ believes that a safe work environment and healthy workforce are the foundation for a successful business.

About AM Best

Founded in 1899, AM Best is the world’s first credit rating agency. It all began with the founder working out of a one-room office in New York City and grew to become what is now the largest credit rating agency in the world specializing in the insurance industry. AM Best is a global credit rating agency, news publisher, and data analytics provider specializing in the insurance industry. Headquartered in the United States, the company does business in over 100 countries with regional offices in London, Amsterdam, Dubai, Hong Kong, Singapore, and Mexico City. For more information, visit www.ambest.com.

SUNZ Insurance Achieves AM Best A- Rating



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INSURANCE

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