



Accelerating Your Career



We are proud to be a team of experienced professionals who take pride in addressing the unique challenges of our clients and providing them with tailored risk management solutions. We believe our team members are what differentiates us in the marketplace. We choose people who are passionate about delivering a best-in-class experience to our clients and prospects.

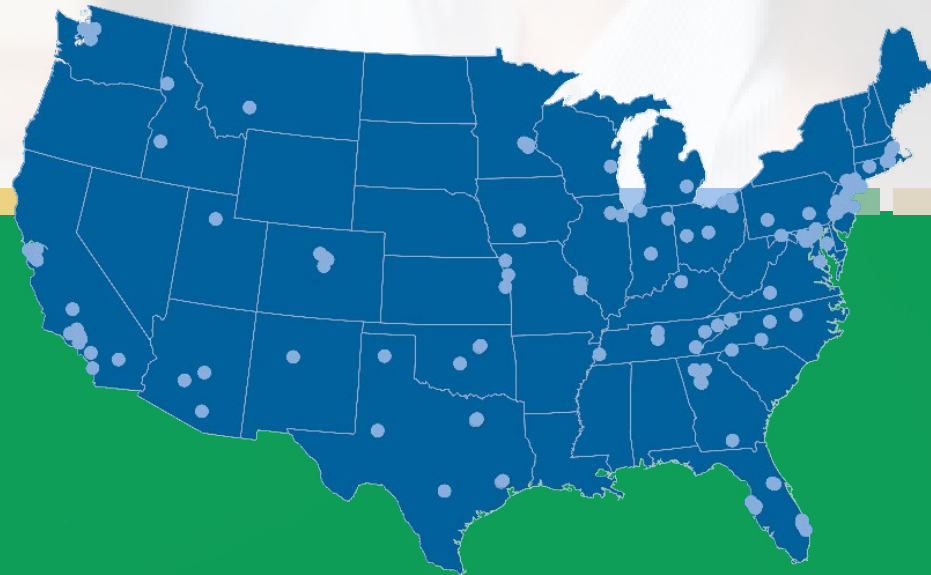
We invest in our employees through ongoing training, allowing time for volunteer opportunities and emphasize communication throughout the organization. These are just some of the reasons we continue to be recognized as a *Great Place to Work* year-over-year.”

— MIKE GILL

Accelerating Your Career

National Resources. Personal Service.

- 6,500+ CBIZ Professionals
- 340+ P&C Team Members
- 120+ Offices Nationwide
- 31,000+ P&C clients



CBIZ
OUR CORE VALUES

We do the right thing.

Our people matter.

We are dedicated to the success of our clients.

We expect to win.

We are OneCBIZ.

TOP 30 Top Global Insurance Broker²

TOP 15 Largest Accounting Provider Nationally¹

TOP 4 Institutional Consulting Team³

RANKED IN THE TOP 2% of all Executive Search Firms

1. Accounting Today – March 2023
2. Business Insurance, January 2023
3. Barron's Top Institutional Consultants – 2022. Rankings and recognition by unaffiliated third parties may not be representative of a CBIZ Investment Advisory Services' client experience and should not be construed as a guarantee of a certain level of results. Neither CBIZ IAS nor its advisors pays a fee to the third party in exchange for the rating.

Get To Know CBIZ

CBIZ, Inc. is a publicly traded, New York Stock Exchange listed company (NYSE: CBZ) and provides professional business services that help clients better manage their risk, finances and employees. With more than 125 offices nationwide, CBIZ is one of the largest accounting, insurance brokerage and valuation companies in the U.S.

CBIZ Insurance Services, Inc., our insurance services division, provides risk management solutions to over 41,000 clients of all sizes by providing national-caliber expertise combined with highly-personalized service delivered at the local level. We offer coverage by the best carriers in the industry, which means better options, value and price. We take the time to build strong client relationships that allow us to recommend and design creative plans to transfer or lessen risk.

We are the only national firm that can seamlessly provide and integrate insurance and risk management solutions. As a professional services company, we consult with clients on various business needs, including:

- Property & Casualty
- Employee Benefits
- Retirement & Investment Solutions
- Financial & Accounting Services
- Talent & Compensation Solutions
- Human Capital Management

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Sharon C.
Senior Director of Commercial Lines

Our organization has such a collaborative, group effort

A Partner That Cares

CBIZ Insurance Services, Inc. provides our clients with the resources of a national broker and the personal attention of a local office. This makes us unique from our competitors because we create relationships with our clients and work with them as an extension of their risk management team.

The people who choose to work at CBIZ are what differentiate us from our competitors.





People-Centered Philosophy

We place an emphasis on investing in our employees through ongoing training, allowing time for volunteer opportunities and emphasizing communication throughout the organization. We are constantly on the lookout for ways to refine our offerings for CBIZ employees and the clients we serve.

We believe diversity and inclusion (D&I) are business imperatives and we are working together toward making them essential and valued parts of our OneCBIZ culture. We strive to create an environment that welcomes, values, respects, leverages and develops our individual differences and similarities. This commitment includes identifying and actively combating racism and discrimination in any form.

We are gratified to have our efforts rewarded with numerous Workplace and Community awards recognizing our goals of employee engagement, optimal outcomes and long-term client satisfaction. These include recognition as a **Great Place to Work**, the **Alliance for Workplace Excellence Seal of Approval** and **The Nation's Best and Brightest in Wellness**.

Hear From Our People

Click [HERE](#) to Play

Gabbie J.
Account Executive

We're consistently collaborating, and bouncing things off of each other, and just making sure

Click [HERE](#) to Play

Nick C.
Vice President

One of CBIZ's core values is that our people matter.

The CBIZ Difference

Unified Professional Services

We view risk holistically, binding together all elements of traditional and emerging risk management needs with human capital management and financial performance. Collaborating with our CBIZ colleagues, we are able to offer a multitude of products and services that empower our clients.

High-Touch Service

Our 95% client retention rate for property and casualty clients speaks to our ability to continually meet or exceed our clients' expectations. This is achieved through proactive, frequent and consistent attention to the client's needs, and fast response to their requests and questions.

Industry Experience

Our focus on key industries helps our clients: benchmark their standing in the marketplace; enables them to leverage the best possible deals with the insurers in their space; delivers advisory solutions as they evaluate alternative risk strategies such as captives; and provides guidance in addressing the unique risk exposures facing their company.

 Arborist & Landscape Contractors	 Banking	 Construction/Contracting	 Daycare & Pre-K Child Education	 Energy	 Entertainment
 Family Offices	 Film & Video Production	 Financial Services	 Florists	 Habitational	 Health Care
 Hospitality	 Manufacturing	 Municipalities & Public Entities	 Not-For-Profit	 Personal Lines	 Private Equity
 Real Estate	 Research & Development	 Restaurants	 Retail	 Resort & Club Management	 Schools & Universities
 Social Service	 Staffing Firms	 Technology	 Transportation	 Utilities	 Wholesale Distribution

WHO SUCCEEDS?

Driven sales professionals with B2B experience, possessing data management and social media skills, as well as high energy and critical thinking, can achieve unlimited income potential and career satisfaction from guiding employers through a complicated maze of employee benefit costs, compliance, administration, strategy and communication.

WHY NOW?

Increasing Job Demand

- Over 70% of P&C companies plan to increase their staff by 2023.
(Source: Insurance Business Magazine)

Above Average Employee Retention Rates

- 84% is the average retention rate for insurance sales professionals.
(Source: Property Casualty 360)
- > 65% of sales professionals hired at CBIZ since 2017 are progressing on a path to success.

Unlimited Compensation Potential

- CBIZ offers a compensation model designed to help you thrive.



CBIZ
INSURANCE
SERVICES, INC.

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Dedicated To Your Success

Digital Lead Generation & Sales Technology

- Sales professionals working at CBIZ benefit from a vast library of thought leadership and marketing content that can be used to develop and nurture leads.
- CBIZ offers sales cadence management software, designed to guide sales professionals through the cold approach and opportunity development processes.
- Leveraging additional technology, our marketing team will organize an automated campaign to help you identify interested prospects.
- Our corporate marketing team will provide you with additional leads from SEO, paid advertisements, webinars, email campaigns, social media and more.
- > 30% of the CBIZ sales pipeline generates from marketing-influenced leads.
- Influenced by digital lead generation, CBIZ has realized a 50% increase in year-over-year pipeline growth.

Sales Compensation

- Our non-validated (or early-stage career) sales compensation is designed with your success in mind. In addition to salary and expenses, you can earn up to 30% of first-year fees and commissions.
- Validation occurs when your recurring book value supports your salary. Once validated, CBIZ will still cover your expenses and you can earn 40% on first-year fees/commissions and 25% on recurring revenue.



Dedicated To Your Success

Unmatched Service Team Support

- Client service is the hallmark of our success. New client acquisition and consistent client service drives sustainable growth for you and CBIZ. Standardized client service deliverables provide our sales professionals a consistent message and a host of industry-leading resources.
- A true measure of our client service team and their clients' satisfaction is our client retention rate. At CBIZ, client retention exceeds 93%, well above the industry average.
- Our sales professionals benefit financially from an average client tenure of greater than 10 years, achieved through our unparalleled service teams and approach.

Creative Flexibility

- CBIZ offers our consultants the freedom to go after any prospect, regardless of size or industry. This freedom and flexibility allow our risk advisors to engage clients they're passionate about.
- With our large, national footprint, there are resources available to ensure you have the information and expertise you need to cater to prospects.

Sales Support

- We provide sales activation guidance, coaching and support. In other words, when you find an opportunity to make a sale, you will be supported by your mentor and your local business unit leader, as well as national experts.
- We provide Salesforce campaign building, sales presentation building, a Request for Proposal (RFP) response assistance and other sales support services.
- Combined with significant investments in selling technology, our marketing team helps our sales professionals generate leads, build a pipeline, increase brand awareness and drive sales.

Sales Culture

- At CBIZ, we thrive on team selling. Our newest team members are assigned a mentor(s) – experienced sales professionals who are financially incented to help you achieve success.

**CBIZ**
INSURANCE
SERVICES, INC.

Accelerating
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Division Senior Leadership Team



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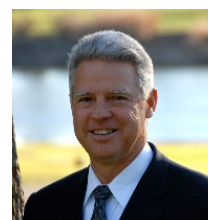


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