

## ABOUT US...

Since 1993 The Moberg Group (TMG) has performed E&O Risk Management Audits, Agency Operations, Sales and Management Training and Automation Seminars on an international level.

TMG has consulted with many of the top national and regional insurance companies, and with several thousand independent agencies and brokers providing E&O Risk Management, business planning, mergers and acquisition assistance, selection of systems to meet operational requirements, agency-company procedures and the implementation of new systems and procedures.

We are the leading provider of Insurance Agency Errors & Omissions loss control programs. And, as the endorsed E&O Audit provider for several state agency associations and E&O carriers, TMG has developed a standard audit process and reporting format preferred by many E&O underwriters.

TMG also publishes the *Agency Operations and Procedures Manual* used by thousands of independent agencies. TMG has also been appointed a Consultant for Insurance Marketing & Management Services (IMMS), and is a Strategic Partner with ReSource Pro, a leading provider of insurance outsourcing.



## The Moberg Group

success with a plan

Specialists in agency operations, management, and business development, The Moberg Group conducts the E&O Review Program for agencies referred by IIAK. The program focuses on the agency's operations, identification of potential E&O exposure, and recommendations for specific actions to be performed within a recommended timetable.

For more information, or to schedule a review in your agency, please give us a call, e-mail, or visit our website at [www.MobergGroup.com](http://www.MobergGroup.com)

### The Moberg Group

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**E&O**  
**RISK MANAGEMENT**  
REVIEW PROGRAM

Provided by

## The Moberg Group

success with a plan

and



Independent Insurance  
Agents of **Kentucky**

## Business as usual is no longer an option...

### E&O RISK MANAGEMENT

Rapidly changing market conditions, increased litigation against agents, changing relationships with carriers, and a series of major natural disasters have taken their toll on the Kentucky insurance industry. For many agencies, their survival is at risk.

To help IIAK member agents remain competitive, well organized, and profitable, IIAK and SwissRe/Westport in conjunction with The Moberg Group (TMG), offer the Agency E&O Review Program for agencies participating in the E&O insurance program.

“Eric Moberg of The Moberg Group was referred to Van Meter Insurance Group by our E&O carrier, and has worked with us since 2007.

We consider Eric & his group more of a partner than just someone doing a risk review. They dug deeply into our operation, looking for areas that can cause E&O issues, and ways to make our operation more efficient. When Eric does find issues he & his staff offer solutions.

Our operation goes from a small 3 person office that specializes in personal lines and farm, to large commercial lines offices. Eric is able to adapt to each operation. It is not a “one-size-fits-all” consultation.

With their experience & knowledge The Moberg Group will be a help to any agency operation”

**Jerry Heming**  
**Vice President Marketing**  
**Van Meter Insurance Group**

### E&O REVIEW PROGRAM

IIAK and SwissRe/Westport provide a **5 year** 10% premium credit for completion and compliance with the Review Program.

E&O Review credits are in addition to the credits received for participation in the E&O education classes provided by IIAK.

TMG, specialists in agency management, operations, procedures, E&O loss control, and agency acquisitions and mergers, is available to perform the reviews.

#### **Agencies that have E&O loss control standards and agency procedures:**

- Become more **profitable**
- **Improve** customer service
- **Increase** sales
- **Expand** use of automation
- **Retain** better employees
- **Reduce** E&O exposure

“Eric has done several Agency E&O reviews for our agency and he always has done a thorough and professional job for us. He went beyond just simply reviewing all our procedures and actually gave us many good ideas to implement as well. We would highly recommend Eric and the Moberg Group.”

**Ted Ostrander**  
**President & CEO**  
**Lassiter Ware Insurance,**  
**A Top 100 Agency**

## The Moberg Group

### SUCCESS WITH A PLAN TO GROW WITH SECURITY

#### *The Review Process Includes...*

##### **Initial on- site review**

- Examines all areas
- Focuses on people and processes
- Develops an Action Plan tailored to your agency
- Establishes a time table

##### **Ongoing assistance**

- Help with procedures, tools and advice

##### **Follow-up review (6 months)**

- Focus plan and timetables
- Review and adjust original plan