

## 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 IIANC. 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

iianc

INDEPENDENT INSURANCE AGENTS  
OF NORTH CAROLINA



## *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 has taken its toll on the North Carolina insurance industry. For many agencies, survival is at risk.

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

“During our initial consideration of the E&O audit, we had concerns as to the value that might be realized by having the E&O audit completed. However, we were pleased with the final result of the audit, the way the audit was conducted and the value we received from Eric’s outstanding ability to recognize where potential E&O claims may occur and recommending what preventive action should be taken. As part of the audit, Eric met with each associate learning our internal procedures, and provided management documentation to review for implementation.”

**Neil Annas, President,  
Granite Insurance Agency**

### E&O REVIEW PROGRAM

IMS & SwissRe/Westport provide a 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 IIANC.

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
- **Improve** use of automation
- **Retain** better employees
- **Reduce** E&O exposure

“Thank you for adding value to Mountcastle Insurance with your consultative evaluation of our client interactions, policies and procedures. We can put your feedback and resources offered to work for us at once. The term “audit” tends to put everyone on the defensive and I found your team approach to be very refreshing. We will be in contact in the future for your input.”

**Walt Rouse, Principal,  
Mountcastle Insurance**

## 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 for 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