

COMMERCIAL INSURERS - Sample Profiles



Unique ID	684664319	695004764	695366764
Firm Location (City)	Boston	Andover	Melrose
Firm Location (State)	MA	MA	MA
Firm Location (Zip)			0
Your firm's geographic range (where you will accept clients from)	National and International	MA, NH, ME and many other states including FL.	All New England states plus NY, NJ, PA, CA, FL, GA, SC
General description of your firm's offerings	Personal Property & Casualty Risk Management Specialist working with c-suite executives and successful families with diverse insurance portfolios nationally and internationally in the areas of Homes, Condo's, Automobiles, Collectibles, Umbrella, Watercraft, Mega Yachts, Aviation, etc.	We offer personal and business insurance. home, auto, umbrella, boat, general liability, workers comp, commercial auto, commercial umbrella, prof liability, cyber, property coverage, employment practices liability and more.	Tarpey Insurance Group, Inc. is an independent, property and casualty insurance agency. We offer risk assessment and customize the following lines of insurance for many types of businesses/organizations: General Liability, Commercial Property, Auto, Workers Compensation, Inland/Ocean Marine related, Errors & Omissions (Professional Liability / Malpractice), Employment Practices, Directors & Officers, Fiduciary, Cyber/Privacy, Crime and more. We also underwrite and issue Surety Bonds.
Specific services or niches your firm specializes in	Media, Entertainment & Sport Division.	We do well in any Main St. business, restaurants, manufacturing, contractors, artichets, lawyers and any personal lines products.	We are a "generalist agency" with areas of expertise are in Construction, Hospitality, Healthcare, Manufacturing and Financial/Legal services.
How your firm gets paid (Hourly, Modular, Commission, % of Sale Price, etc.)	Commission paid from the Insurance Carrier(s). Percentages change with programs and carriers. Generally in the area of 15-20% of the annual premium.	Commission	Commission from insurance company partners.
Do you do free initial consultations? 30 mins, 60 mins?	Yes.	Yes, for as long as needed	Yes - all consultation is free.
Number of employees in your firm	Nationally close to 11,000	10	36
What makes your firm unique?	We can insure all needs of Property & Casualty insurance. Pulling the right team together to assist the prospects/clients accordingly.	We have been in business for 75 years and we are not a set it and forget it agency. We review all policies each year to ensure the right coverage at the least cost. My clients call me directly on my cell phone and I am available on nights and weekends as well. I always do what is in the best interest of the client and help in any way possible. Integrity is everything to me and my agency. Our clients love us for a reason, we really do care and we always do what is right.	We are family owned with three generations involved. Our mission is to design and obtain appropriate insurance products to best protect our client's assets and income. With honesty, integrity and education, we strive to provide quality, genuine and professional insurance counseling to current and prospective clients. We meet AT LEAST once a year with our clients to review their insurance program and discuss changes or client concerns. We are also heavily involved in the claims handling process to educate our clients and be sure a claim is settled quickly and fairly.
Minimum Client size (# of Employees / Revenue / EBITDA etc.)	No mimimum	We help everyone from a start up company to a company getting ready to go to the next generation. 1 person to 200+ employees	no minimum
Industries Services (All or Specific)	All	All	All
Other criteria in choosing your prospects	Insurance is a program that is pulled together to response correctly at a time of loss. Make sure you have an advisor willing to educate and is available to guide you in this area.	We chose to work with clients that see the need for insurance and want to have a working relationship with their agent. We prefer not to work with clients that just want the least, bare bones policies as when they have a claim we do not want them to be unhappy with us or the company.	
Number of years experience in your field	25 plus	17	9
Industry Designations (CFP, CLA, CPA etc.)	CISR, ACSR, CPPL, CPRIA	Licensed Agent	CIC, MLIS
Best times to contact you			0
Preferred Communication Methods	In Person, Phone, Email, Text, Zoom / Skype etc.	In Person, Phone, Email, Text, Zoom / Skype etc.	In Person, Phone, Email, Text, Zoom / Skype etc.
Elevator Pitch / Anything prospective clients should know about you? (optional)	"Red Flags" within Personal Property & Casualty *Property in catastrophe-prone areas (FL, TX, CA or coastal) *High Public profile lifestyles - Media/Entertainment/Sports *Board membership *Large collection of art, antiques, jewelry *Property in trust	I have the highest integrity and will always do what is best for the client. My many years of working in the industry gives me insights that I can share. I come from a large family with values. My agency has very good retention and highly values all our customers. We have many markets that we use to obtain the best coverage at the least cost.	