



Line of Business	Risk Type	Challenges	Description	Premium
PL / GL	Healthcare	Multi-state loss sensitive acute care hospital with varying structures by states and manuscript wording for unique staffing exposures	Arranged layer penetration worksheet to engage competition and craft structure to address states with severity issues	\$908,000
E&O	Real Estate	Multinational property manager with diverse operations	Manuscript wording to address unique claims reporting and multi-faceted professional services	\$336,000
EPL	Car Dealership	Multi-state with claims	Improved terms, retention and pricing in two days	\$67,000
Professional Liability	Legal	Incumbent agent was in place for 10+ years	Detailed coverage comparison and unique trustee wording secured trust and comfort from insured	\$61,250
Professional Liability	Legal	Incumbent broker was unable to access a particular market	Our semi-exclusive relationship knocked the primary carrier out of the placement and saved the insured well over \$50K	\$600,000
EPL	Public Services	Large restaurant group with significant losses over the past 3 years and being non-renewed by incumbent carrier	Convinced underwriting that while frequency was high, compared to the number of employees the insured had, it wasn't as significant as it seemed. Replaced coverage and increased limits for less than expiring premium.	\$88,000
Cyber	Transportation	Large auto dealer was concerned with the current placement they had with their current agent since it was placed direct and missing quite a few coverages	Improved wording, added coverage grants, and increased limits significantly for the same premium as expiring	\$61,000
D&O / E&O / EPL	Financial Institution	Large mortgage bank had been with incumbent market for many years on a restrictive policy form designed for smaller risks	Significantly improved terms and kept premium under the renewal offer	\$1.1M
Fund D&O / E&O	Private Fund Operator	Real estate advisor and syndicator's expiring policy was a \$500K limit on an MPL policy with no D&O and restrictive exclusions	Moved to a \$5M limit on a true Fund D&O / E&O for less premium than expiring	\$5,000
Cyber	Gastroenterology Network	Lackluster expiring cyber placement was missing a number of coverages	Replaced expiring program, while adding a suite of enhancements and fixing problems with contractual liability exclusions relating to HIPAA and Business Associate Agreements	\$60,000
Cyber	Pharmacy Network	Insured has been on an acquisition spree driving up revenue, exposure, and record counts	Able to keep pricing nearly flat, despite doubling PHI counts	\$65,000
Cyber	Radiology Center	Network of radiology centers needed improved coverage	Placed coverage inclusive of contractual coverage for their Business Associate Agreements, contingent bodily injury coverage, and betterment coverage for HIPAA corrective action plans	\$30,000



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