



## **WEST INSURANCE GROUP**

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**Comprehensive Risk Management, Brokerage &  
Financial Services**

**Offices in Pennsylvania and Massachusetts**

Executive Headquarters:

1528 Walnut Street, Suite 200, Philadelphia, PA 19102

TEL: (215) 563-0100 FAX: (215) 563-4509

[www.westagy.com](http://www.westagy.com)



Providing our customers with quality products and exceptional service in a cost effective manner is the foundation upon which West Insurance Group was built, and on which it will continue to grow. Our knowledgeable and professional staff meet the highest industry standards. We are committed to helping you achieve all of your insurance and risk management needs with integrity, reliability and accountability.

# Company Profile





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## Company Profile

**West Insurance Group** is one of the largest minority-owned insurance agencies in the country. With offices in Boston and Philadelphia, West provides a wide range of commercial and personal insurance products and financial services. Founded in 1991, West Insurance Group serves individuals, businesses, and government entities under an umbrella of agencies with annual sales over \$120 million.

Providing customers with quality products and exceptional service at a good value is the foundation upon which West Insurance was built and continues to operate. We guarantee our clients absolute honesty and integrity in all matters. West Insurance Group has a legacy of long-standing clients and a commitment to customer service. Some of those clients include: the City of Philadelphia, Lincoln University, Pennsylvania Convention Center, School District of Philadelphia, Reebok and the Philadelphia Gas Works.

West Insurance Group's products and services are among the most comprehensive in the industry. We provide our clients a full array of risk management services, insurance placement, employee benefits consulting, self insured and TPA management.

In 1995, West Insurance Group founded Urban Underwriters Insurance, an agency dedicated to providing insurance products and services to underserved urban communities. Through training and education, Urban Underwriters has empowered local producers and given urban customers access to high quality insurance products. Since its formation, Urban Underwriters has trained 250 producers, insuring almost \$2 Billion in property value throughout urban neighborhoods in Massachusetts.

West Insurance Group and its staff have earned several awards including the 2007 Minority Vendor of the Year Award from Blue Cross/Blue Shield and

the Black & White Coming Together Award. This award was presented by Boston Mayor Thomas Menino for creating economic development in urban areas. As a community, West has partnered with major fundraising initiatives such as the YMCA, American Red Cross, the Kappa Alpha Psi Fraternity Scholarship Program, Lincoln University, Philadelphia Cares and Community Council for Mental Health & Mental Retardation.

# Scope of Services





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## **Scope of Services**

In an ever-changing marketplace, clients require knowledge, integrity and accountability. West Insurance partners with the most reputable and reliable carriers to protect our customer's interests and assets by providing a full-line of insurance and financial products and services which includes:

- **Commercial Property & Casualty Brokerage**
- **Risk Management Analysis**
- **Self Insured & Excess Programs**
- **Loss Control & Claims Management Services**
- **Owner Controlled Insurance Program Management (OCIP)**
- **Workers Compensation**
- **Directors & Officers Liability**
- **Professional Liability**
- **Personal Home & Automobile**

# Client Service Program





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## Client Service Program

Our relationship with our clients centers on developing a comprehensive insurance and risk management program based on their specific needs. Professional development is an important aspect of West Insurance Group's company culture. We monitor and analyze changes in the insurance marketplace to ensure that we are knowledgeable about the most up-to-date industry products, services, regulations and trends. We use this knowledge to execute a unique service approach which includes:

- ***Learning your business*** to ensure that we prepare the most detailed and comprehensive risk management package that represents your company's individual coverage needs.
- ***Creating a needs assessment package*** which includes underwriting information, insurance specifications, negotiated terms, and a complete products and services quote.
- ***Reviewing your coverage*** to periodically assess claims and consult with carriers to ensure that performance standards are being met.
- ***Professional Trends Analysis*** to assess potential changes in risk levels which could affect future coverage availability and cost.
- ***Proactive and ongoing communications*** to ensure customer satisfaction and assess changing products and service needs.

# Principals & Key Officers





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## Principals & Key Officers

**Bernard T. West – Chairman & Founder**, has over 35 years of progressive leadership and administrative experience in the financial services industry. After a stellar career with several Philadelphia banks and the Federal Reserve Bank of Boston, Bernard served as Director, President and Chief Executive Officer of Coolidge Bank and Trust in Boston. He has served on numerous boards including Boston Fair Housing, Urban League Economic Development Council, Arbella Mutual Insurance Company and the Boston Economic Development & Industrial Corporation. Bernard holds a B.S. from Philadelphia University (formerly Philadelphia College of Textiles and Science)

**Michael M. Jones, CIC – President & CEO**, Michael is responsible for the development and marketing of new business prospects as well as heading our large accounts division. In addition to his insurance background, Michael has over 20 years of experience in sales and management. Michael is a Philadelphia native and a graduate of Temple University. Michael holds the professional designation of Certified Insurance Counselor.

**Anthony M. Johnson, Sr. – Director of Marketing**. Anthony's responsibilities include the implementation of the West Insurance Group marketing plan. A graduate of Cheyney University, a member of Kappa Alpha Psi Fraternity Incorporated, and a Master Mason, Anthony also sits on a number of Not for Profit boards. Anthony resides in Philadelphia with his wife Jackie and his two sons, Anthony Jr. and Adrian.

**Michelle F. Sangster – Vice President**, as V.P., Michelle is responsible for West Insurance Wholesale Brokerage Operations, including business development, marketing strategies, and overall growth for the division. In addition, she fully services a retail book of business for our large accounts division. Michelle has over 15 years of demonstrated leadership in the insurance industry including extensive retail brokerage and wholesale underwriting experience.

# **Partial Client List**



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## Partial Client List

City of Philadelphia, Risk Management Department  
Lincoln University  
Monmouth University  
Philadelphia Museum of Art  
The African American Museum of Philadelphia  
Pennsylvania Convention Center Authority  
Community Council for Mental Health and Mental Retardation  
Reebok International  
School District of Philadelphia  
Camden County Council on Economic Opportunity  
SEPTA  
Kappa Alpha Psi Fraternity, Inc.  
Massachusetts Bay Transit Authority  
Philadelphia Gas Works  
Philadelphia Workforce Development Corporation  
PRWT Services, Inc.  
Transitional Work Corporation  
The Philadelphia Tribune  
Veridyne, Inc.  
The Hospitals & Higher Education Facilities Authority of Philadelphia  
Reading Terminal Market Corporation



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