



MINDFUL

INSURANCE SOLUTIONS INC.

CAPABILITIES BROCHURE

innovative solutions
for nonprofits

www.mindfulins.com

About Us

You may not have heard of us, but we've been around for 20 years! We recently changed our name from "The Unified Broker's Insurance Agency" to "Mindful Insurance Solutions" to better represent what we are about.



Our team started serving businesses 20 years ago providing consultation services to the broader business community, primarily focusing on nonprofits where our passion for community service shines.

Each new client goes through our rigorous proprietary Mindful Assessment™.

From there, we develop customized programs and based on each of our client's unique situation and needs. We make sure that their investments in healthcare, workman's comp, and commercial insurance are maximized, and in many cases, we save our clients thousands of hundreds of dollars!

Once you are one of our clients, every year we review your products and services and improve our offering when possible. You can also expect a yearly performance review to further discuss your organization and it's current needs.

“ We saved \$148,000 in 2 years with Mindful!



Denyse Cardoza

Executive Director - Placer Community Action Council

“ Best broker I have worked with in 17 years!



Sean Harrison

Founder and Director - Soil Born Farms

“ Since Mindful, we saved \$60,000 a year.



Matthew Rogina

CFO - Vocational Improvement Program

Our Difference

We are unlike most Insurance Brokers. We make a difference for our clients by going above and beyond our client's expectations..

This is how we are different:

- » We use a Proprietary **MINDFUL** Methodology™.
- » We offer Telehealth 24/7, at **no cost** to employees.
- » We **tailor** Workers' Comp Programs.
- » We use a **Proprietary** Designed Dental Program.
- » We offer **Proprietary** Designed Medical Plans.
- » We are the **ONLY** Broker to offer **Complimentary** Triage Services, (\$85/call).
- » We offer **Complimentary** Concierge Services.
- » We offer **Complimentary** Consulting Services.
- » We **Contribute 1% to 3%** of our Commission Back to our Clients



2300+

Tailored Policies



\$1,000,000

Client Savings

Our Proprietary **MINDFUL** Methodology



STEP 1: Our Wholistic Mindful Assessment

We review the goals and risks of your organization, what's in place, the corporate structure, and your assets.

STEP 2: Our Innovative Recommendations

Our recommendations are innovative and tailored to your organization. These are created with cost control measures and budgetary constraints in mind.

STEP 3: Implementation of Tailored Solutions

We put in place commodities that enhance and increase your services to meet community needs.

STEP 4: Our Transparent Review

Once a year, we conduct a transparent review of our tailored commodities and services, and make adjustments to reach the goals set in our Tailored Recommendations.

STEP 5: Annual Performance Report

In our Annual Performance Report, we review what we have accomplished over the last year and adjust our recommendations or introduce new ones per need.

Our Services

After we've completed the Mindful Assessment is completed, we will recommend which services and commodities fit your organization best.

WORKER'S COMPENSATION

- Claims Services
- Loss Control
- Safety / Risk Management
- Safety Videos
- Audit Review / Dispute Services
- Class Code Review/Changes
- Injury Illness Prevention Program
- Experience Modification Forecast
- OSHA Employment Posters
- Triage Services
- Employee Concierge Services
- Claim Folders / Support
- Market Analysis Proposal
- Unit Stat Review

COMMERCIAL INSURANCE SERVICES

- Marketing Analysis Proposal
- Certificate Of Insurance Issuance
- Designate Account Managers
- Risk Assessments
- Auto I.D. Cards
- Insurance Assessments
- Endorsements / Changes
- Financing Of Insurance Premiums
- Claims Monitoring / Processing
 - Auto*
 - Property*
 - Liability*
 - Fiduciary*
 - Crime*

BENEFIT INSURANCE SERVICES

- Designate Account Managers
- HR/ Benefit On-Boarding Software
- COBRA Services
- ERISA Wrap Documents / Services
- FMLA Monitoring
- MERP Plan Administration
- ACA Compliance Administration / Testing
- Filing of 5500 Forms

- Benefit Statements
- Self-Insured Client Trust
- Market Analysis and Benchmarking Benefits
- Centralized Eligibility Services
- Processing Enrollments/Changes
- Claims Advocacy
- Benefit Education
- Group / One on One Enrollments

TELEHEALTH

RETIREMENT SERVICES



2300+

Tailored Policies



\$1,000,000

Client Savings

Our Commodities

What ever your needs, we have the right solution. Each one of our recommendations is tailored to each situation and client.

COMMERCIAL INSURANCE COMMODITIES

- Auto
- Bonds
- Coarse of Construction
- Crime
- Cyber
- Directors & Officers
- Employee Dishonesty
- Employee Practices Liability Insurance (EPLI)
- ERISA
- Fidelity
- Fiduciary
- General Liability
- Improper Sexual Misconduct L
- Liquor Liability
- Participant Accident
- Professional
- Property
- Self-Insured Workers' Compensation
- Medical Malpractice
- Workers' Compensation
- Umbrella/ Excess

BENEFIT INSURANCE COMMODITIES

- Ancillary (Worksite)
 - Supplemental Life (Whole, Term, Universal)*
 - Accident*
 - Critical Illness*
 - Cancer*
 - Short / Long Term Disability*
 - Hospital Indemnity*
- Dental
- Life
- Medical
- Partial or Completely Self-Insured
 - Medical*
 - Dental*
 - Vision*
- Vision
- Telehealth
- Specialty
 - MEC Plan*

INSURANCE PREMIUM FINANCING

Biography - Bill Donaldson

Bill's career started in Seattle in the early 80's in business banking, with specialized training from the American Institute of Banking (AIB) and a finance degree from Columbia Pacific University.

Shortly after, Bill started volunteering in the community with United States Triathlon Series and a few years later, with Head Start. In 1985, Bill moved from Seattle, Washington to Davis, CA.



Bill has spent 20 years in the non-profit sector serving in a multitude of positions from line staff to executive roles. He thoroughly understands partnerships and collaboration and has proven his ability to bring groups and individuals together for a common cause throughout California. Bill was instrumental in utilizing a Domestic Peace Corps program, known as AmeriCorps, in social and health services, where it had never been done before. This effort led to maximizing nonprofit existing resources, therefore expanding services, and building partnerships throughout California.

Bill is highly recognized for his creative management solutions to address administrative, fiscal and program needs of non-profits. For the last fifteen years, he has served as a full-service broker and has a proven track record with current clients to reduce overhead, maximize employee benefits and increase efficiencies in all areas of non-profit administration.

Bill has been a guest speaker on several issues regarding leveraging existing resources, assessing liabilities of the organization, understanding benefits and developing tailored specific employee benefit packages with various organizations and for conferences.

Bill serves as the President and Chairman of the Board for Mindful Insurance Solutions, Inc. He is excited about his role and he acts as a change agent in many cases, negotiating strategically to benefit the clients.

Bill is also a council member for two insurance carriers specializing in non-profits and is an executive board member of the Region IX Head Start Association, Finance Committee Member of Yolo Hospice. In addition, Bill is a trainer for the California Head Start Association and advisor for the Training & Leadership Community.

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