

Small Account Solutions for Property & Casualty

Getting the most value for your
small accounts.

Successful management of small business accounts is often the difference between high and low growth agencies. Patra seamlessly integrates with your agency to manage and aggressively grow your books of small business. Our flexible Select service model provides a variety of options for your P&C books, both personal and commercial lines, so your staff can spend more time focusing on key accounts and agency relationships without sacrificing service levels your customers expect.

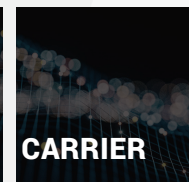


The beauty of this is now I've got a place to put small accounts. We get a piece of the income while our people don't have to spend any time on it. What can be bad about that? We've got a built-in, reliable profit margin.

Patra Select Client
CEO

- ☑ Dedicated account staff
- ☑ Comprehensive account management
- ☑ Guaranteed profit margin
- ☑ Increased capacity for existing staff
- ☑ Account rounding and new business support
- ☑ Reduced Risk Exposure

Markets Served



Questions about Patra Select

How will Patra Select help my agency?

Patra's experienced account service team enables you to redeploy staff resources and focus on key revenue-producing accounts. Patra's team will manage every aspect of your book, from answering calls and managing policy changes to marketing new business and rounding accounts.

Will I continue to be Broker of Record?

Depending on your specific needs, you have options when you configure your Patra engagement for P&C: you can remain Broker of Record or have Patra become the Broker. Your agency goals will determine which option meets your needs. No matter which option you choose, transferring accounts back to agency management is simple.

What makes Patra the right partner?

Patra's experienced account managers work exclusively on your business, managing your small business clients with the same care and expertise as your team. Patra's staff is located throughout the country, allowing us to match the right account manager to fit in with your agency's culture, plans, service goals and time zone.

How do I get started?

It's simple to get started with Patra Select. The first step is for Patra to assign your firm an account manager who will guide the process. Your Patra account manager will:

- › Meet with agency staff
- › Define parameters of book to be managed
- › Initiate communication plan to agency, carriers and customers
- › Transition account service to Patra Select

Patra Select at a Glance

\$220M

Select Premium
Managed

60,000

Select Policies
Managed

\$32.5M

Select New
Business Premium

200+

Licensed
Agents

0

E&O Claims

2,605

INC 5000
Ranking

PATRATM

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It's that simple. Get the ball rolling by reaching out to Patra
business development team at sales@patracorp.com