



**TRUENORTH**  
**TRANSPORTATION**  
**RISK**  
**SUMMIT**  
**AUGUST 17-18**  
**CEDAR RAPIDS, IOWA**



**TRUENORTH**  
**TRANSPORTATION**  
**RISK SUMMIT**  
CEDAR RAPIDS, IA  
AUG 17 • 18, 2016



**JASON SMITH**

TrueNorth



**TRUENORTH**  
TRANSPORTATION  
RISK SUMMIT  
CEDAR RAPIDS, IA  
AUG 17 • 18, 2016

# TRUENORTH MISSION STATEMENT



## OUR PURPOSE

To create value.

## OUR MISSION

To assist companies and people with protecting and maximizing assets, resources, and opportunities.

## OUR VISION

To create a legacy company through an entrepreneurial platform that attracts, develops, and coordinates high performing talent & opportunities.

# TRUENORTH FIRM GOALS



## GOAL 1.

Profitable revenue growth.

## GOAL 2.

Develop a “quality of life” workplace.

## GOAL 3.

Position the company for a succession strategy (not sale).

## GOAL 4.

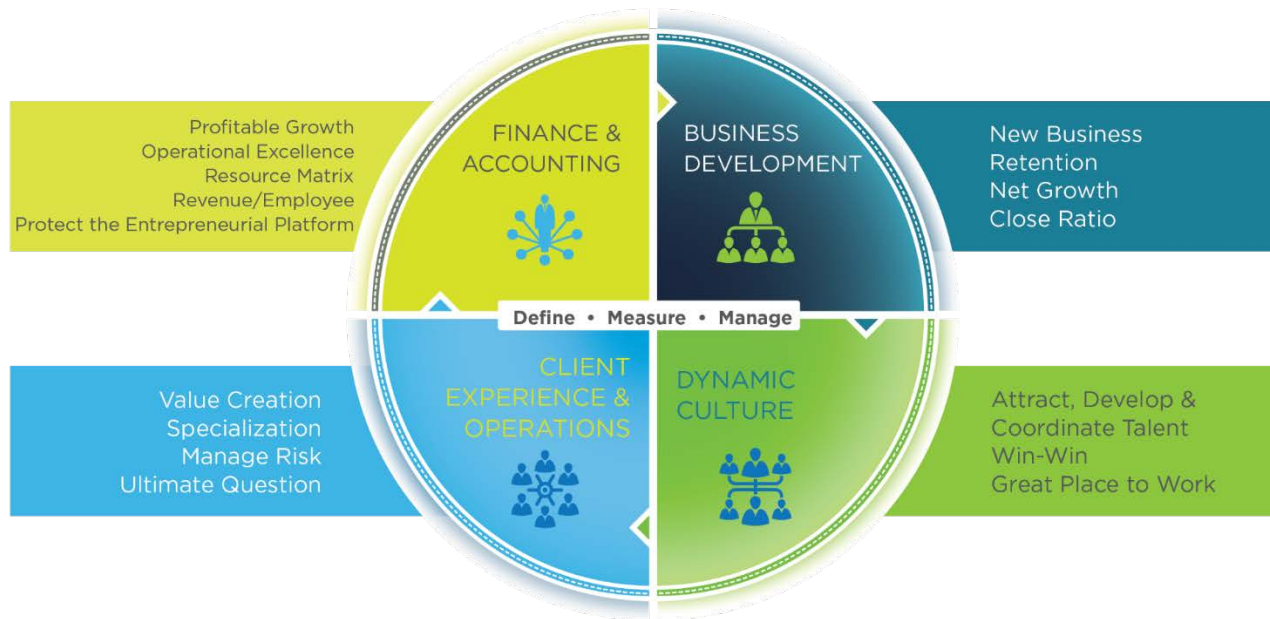
Develop a proprietary entrepreneurial platform.

# STRUCTURED ENTREPRENEURIALISM



Attract, develop, and coordinate high performing talent and opportunities with an entrepreneurial model.

## Best In Class **Strategic Coherence**



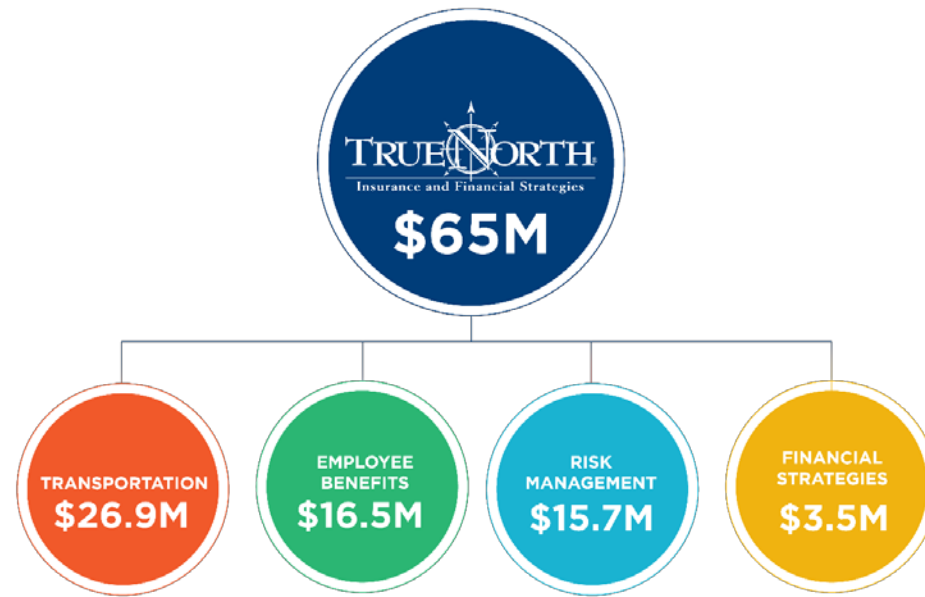
## 5 Key Elements of Success



# ABOUT TRUENORTH



- \$65 Million in revenue (estimated)
- Privately-held
- Independent Insurance Firm



# NATIONAL RECOGNITION & ACCOMPLISHMENTS IN 2015



## INSURANCE JOURNAL

TOP 100 INDEPENDENT INSURANCE AGENCY LIST

**SPECIAL REPORT**  
**Insurance Journal's Top 100 Privately Held Property/Casualty Agencies**  
 Ranked by Total 2014 P/C Revenue

Rank	Agency	2014 Total P/C Revenue	2013 Total P/C Revenue	% Change	2014 P/C Revenue per Agent	Number of Agents
50	TrueNorth	\$26,950,000	\$23,340,000	15.4%	\$1,123,000	24

**TRUENORTH**  
 Insurance and Financial Strategies  
 www.truenorthcompanies.com

#50 TRUENORTH



**Top 100**

Rank	Agency	2014 Total P/C Revenue	2013 Total P/C Revenue	% Change	2014 P/C Revenue per Agent	Number of Agents
64	TrueNorth	\$26,950,000	\$23,340,000	15.4%	\$1,123,000	24

#64 TRUENORTH



#3,853 TRUENORTH

**TrueNorth (Iowa)**  
 Offers individuals and businesses risk management, personal home, auto, liability, financial planning and health insurance services.

f t g+ in e+ v+

**Inc. 5000 #3853 2015**

2015 Inc. 5000 Rank	#3853
3-Year Growth	79%
2014 Revenue	\$48 M
Jobs Added	111

Location	Cedar Rapids, IA	Country	United States
Founded	2001	Employees	244
Industry	Insurance		
Website	http://truenorthcompanies.com		

16 INC. 5000 HONORS

16 Top Iowa companies

HONOR ROLL Five-Time Inc. 5000 Honoree



# TRUENORTH LOCATIONS



## GROWTH within the nation...



2001 Cedar Rapids, IA - Headquarters and Cedar Falls location opened

2005 Des Moines, IA

2007 Kansas City, KS

2009 Brentwood, TN

2009 Dallas/Ft. Worth - First office

2010 Peoria, IL - Acquisition of Risser & Company

2011 Cedar Rapids, IA - Acquisition of Shifflett Insurance

2012 Dallas/Fort Worth - Expanded footprint in the area with acquisition of Employer Planning Services

2012 Des Moines, IA - Increased market share with the merger of Frank Berlin & Associates

2012 Longmont, CO - Acquisition of First Mainstreet Insurance

2012 Quad Cities, IL - Acquisition of RJ Lee & Associates

2013 Grand Rapids, MI

2016 Chicago, IL - Acquisition of Meeker Magner

2016 Perry, IA - Acquisition of RHC





# TRUENORTH & THE TRANSPORTATION DIVISION



**TrueNorth® Mission:** To assist Transportation Companies and their people with protecting and maximizing assets, resources, and opportunities.

