J. Manning & Associates and LTCI Partners work together to bring best in class service and support for our clients.

J.MANNING & ASSOCIATES

POWERED BY LTCI PARTNERS, LLC

WHAT SETS US APART

As an industry leader we offer customized solutions for employee benefits brokers, financial services professionals and employers. Our expertise is matched only by our personal commitment to each client.

- Singular focus on LTC Insurance planning solutions
- National roster of strategic partners from the Top 25 Employee Benefits firms in the marketplace*
- Turnkey sales, education and enrollment solutions
- State-of-the-art technology in email communications platform and online enrollment engine
- Leadership background from national brokerage firms and insurance companies

300+
employer-sponsored LTC programs implemented

$135 Million
in-force premium with multiple insurance carriers

25 Years
experience in the LTC insurance marketplace

WHY PARTNER WITH US

We're passionate about bringing LTC planning solutions to the worksite

Top Industry Leadership

We see your business through your eyes. Our experienced team consists of former leaders from national benefit brokerage firms and insurance companies.

Enrollment Technology

From our proprietary enrollment platform to custom enrollment communications, we provide a robust and turnkey client experience. It's simple, efficient, and thorough.

A Personal Touch

For us, it's personal. Our team cultivates partnerships built on trust and open communication. All of our enrollment consultants work for us from our internal world-class call center.

"We See Your Business Through Your Eyes"

Employer Market Expertise

JMA Core Competencies

- Client Experience – Group & Individual Client Expertise:
  - 300+ Employer Sponsored LTC Programs – 18 Clients 10,000+ Employees
  - Extensive “Large Employer” Experience Amongst JMA Leadership
  - Expert at Making Complicated Programs “Employee Friendly”
- Administrative Capabilities & Capacity:
  - Customized, Intuitive Client Website With Video Content
  - VOIP Call Center Technology – Recorded Lines/Archived Records Management
  - Dedicated, Client Specific, Toll-Free Telephone Number
  - Extensive Call Center Capacity – Handled 114k+ Inbound Calls in 2016
  - Proprietary Email Platform – Customized, Personalized Communications

WHAT WE DO

Employer-sponsored LTC solutions

Sales & Enrollment Management

We developed a highly organized sales and enrollment process. We offer tested, effective communications to enroll employees.

Pre-Enrollment

- Dedicated sales and account management
- Establish implementation and communication plan
- Employer endorsement

Enrollment

- Personalized enrollment communication
- Multi-faceted educational campaign
- Online enrollment
- Deadlines & reminders

Follow-Through

- Dedicated case management
- Enrollment status updates
- Post enrollment reports
- New hire enrollments

Ongoing Administration & Support

We take on all the heavy lifting, which enables our clients to provide a high-quality benefit without taking time and resources away from them.

Administration

Our proprietary online enrollment system enables high-quality service and expert enrollment experience.

Technology-Driven Support

Web-based education, online enrollment portal, and 1-on-1 virtual consultations with salaried call-center consultants.

Data Customization & Security

Data security consistently adheres to mandated industry and client standards.

Jerry A. Manning, CLTC

Principal, Group Sales Leader, J. Manning & Associates

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J. Manning & Associates is a national independent insurance brokerage and consulting firm specializing in Long-Term Care Insurance. We work with employee benefit brokers and consultants, financial professionals, employers and individuals to create customized, unbiased Long-Term Care planning solutions.

In 2011, the American Association of Long-Term Care Insurance named J. Manning & Associates the largest Group Long-Term Care broker in the nation based on 2010 premium production.

Jerry A. Manning is the founder and President of J. Manning & Associates and one of the largest producers of Long-Term Care Insurance in the Industry. Jerry has spent over a decade helping clients design and implement customized insurance programs in the employee and executive benefits markets.

As a nationally recognized leader in the LTC industry, Jerry is highly sought after as an author and expert speaker for organizations such as the Society of Actuaries, the Minnesota State Bar Association, Financial Executives International (FEI), The Indiana Health Care Association, The National Business Institute, Life Insurance Selling Magazine and he served on the advisory board of the Alzheimer's Association Corporate Roundtable.

Prior to founding J. Manning & Associates, Jerry served as Vice President of Long-Term Care for Marsh Executive Benefits, a division of the world's largest insurance broker. Before joining Marsh, Jerry was a wholesaler for a national employee benefits carrier writing group disability, dental and life insurance.

Jerry holds the professional designation of Certified in Long-Term Care (CLTC) and he is a certified continuing education instructor for legal, accounting, and insurance professionals. He graduated from Western Illinois University with a bachelor's degree in communications.

Steven M. Cain, CLTC

Principal, National Sales Leader, LTCI Partners

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Steve Cain is a Principal and National Sales Leader for LTCI Partners, one of the nation's largest Long-Term Care Insurance (LTCI) wholesalers. In that capacity, Steve is responsible for increasing the firm's sales revenue – from the development of existing client relationships to acquisition of new institutional accounts.

Steve brings more than 15 years of experience in the insurance brokerage market, most recently as Senior Vice President and National Sales Leader for Long-Term Care at Marsh Private Client Services, a division of Marsh USA, Inc. Steve helped build Marsh into a leading wholesale and retail distributor of LTC Insurance, working with banks, independent broker-dealers, wirehouses and employee / executive benefit brokers.

Prior to joining Marsh, Steve worked at LifeCare Assurance Company, a third party administrator (TPA) that specializes within the LTC Insurance industry. While at LifeCare, Steve was on a team that introduced several LTC Insurance products (Allianz Life, Fortis, Lincoln Benefit Life, MassMutual, etc.) products into the brokerage distribution channel. With experience that ranges from the home office to retail sales, to the brokerage market, Steve has gained valuable insight on all aspects of the industry, from sales and marketing, underwriting, policy administration, and claims.

Steve is passionate about enhancing awareness of the LTC Insurance industry, having authored numerous articles in such publications as Financial Planning Magazine and National Underwriter. Steve is a certified continuing education instructor for insurance and accounting professionals and he regularly addresses industry groups such as state bar associations, the American Association for Long-Term Care Insurance (AALTCI), the Association for Advanced Life Underwriting (AALU), the Society of Actuaries (SOA), the National Association of Health Underwriters (NAHU), the Million Dollar Round Table (MDRT), and the National Association of Insurance and Financial Advisors (NAIFA).

Steve is a graduate of the University of California at Santa Barbara. After graduation, he had a brief career in professional baseball, pitching in the farm systems of three professional teams. Steve is married with two young daughters and resides in Los Angeles, CA.

Ruth Larkin, CLTC

Regional Sales Leader, J. Manning & Associates

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Ruth Larkin is a Regional Sales Leader for J. Manning & Associates. She brings over 30 years of experience in Employee and Executive Benefits, and 20+ of those years in the Employer Sponsored LTC Market. Ruth is a recognized sales leader, industry speaker and committed advocate for enhancing awareness of the challenges surrounding LTC.

Prior to joining J. Manning & Associates, Ruth was a 17 year veteran at John Hancock Group LTC, where she was responsible for LTC Program sales and implementations with Brokers, Consultants and Major Employers throughout the Western US. In that role, Ruth worked with many of the Nation's most prestigious employers, colleges and Universities and the experienced gleaned from these complex, yet successful sales and installations is invaluable in today's LTC market.

In 2010, Ruth built a successful start-up operation specializing in Employer-Sponsored LTC Programs, in partnership with J. Manning & Associates and LTCI Partners, and then formally merged that success with J. Manning & Associates/LTCI Partners to further enhance the client experience.

She holds a Certification in Long-Term Care (CLTC), is a member of the Society of Actuaries LTC Group, the American Association for Long-Term Care Insurance (AALTCI), NAHU and is an active Sitting Member of NAHU's National LTC Advisory Committee. Ruth received the Leadership Award for Excellence in Voluntary Benefits from Voluntary Benefits Magazine and the 2012 Voluntary Benefits Conference, in recognition "For dedication and passionate pursuit to raise awareness of the challenges surrounding LTC". She is a graduate from Wichita State University.

Zach Oates

Vice President, Marketing & Strategy, J. Manning & Associates

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Zach Oates is the VP of Marketing and Strategy with J. Manning & Associates, where he develops Employer Sponsored Long-Term Care Program strategic communications and intelligent technology decision support.

Zach has been instrumental in the development of the J. Manning & Associates implementation and employee education platforms. His client management experience combined with his extensive technology expertise provide a unique, high touch approach that aligns well with today's rapidly evolving employee benefits "best practices".

In his strategic role, Zach is responsible for developing the technology and decision support tools to ensure each client implementation provides clear and concise access to the educational information potential insureds need to make informed benefit decisions.

Zach joined J. Manning & Associates in 2012 to lead our implementation and client service efforts. His insight and technology expertise combine to continually enhance the employer and employee experience.

Prior to joining J. Manning & Associates, Zach worked for a technology start-up located in Chicago, where he was responsible for implementing and maintaining corporate software solutions.

Zach graduated from Northern Illinois University with a bachelors degree in marketing.

Trina R. Brown, CLTC

Business Development, LTCI Partners

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Trina Brown is a Business Development Lead for LTCI Partners, one of the nation's largest Long-Term Care Insurance (LTCI) retail and wholesale brokerage enterprises.

Trina graduated from Florida State University, where she received a BS in International Finance. After graduation, Trina remained countryside and accepted a position to launch Capital Administrative Services, Inc. (CAS), a new third party administrator for employee benefits out of Tallahassee, Florida, and served as Executive Director and Board Vice President until 2012. During Trina's tenure with CAS she procured voluntary benefits for over 110,000 state employees and helped secure CAS as a leader for employee benefits and individual life insurance planning in the State of Florida.

Trina's determination to enhance the awareness for long-term care planning resulted from her dual role where she served as Director of Long-Term Care for Capital's sales agency and worked in tandem with Capital's Regional Vice President's to develop and implement retail product and sales training for agents.

Now for over a decade, Trina has had the pleasure of helping brokers, advisors and consumers find a long-term care solution and she understands the challenges in starting a dialogue about this type of planning.

Whether serving consumers directly, or supporting professionals who do, Trina is committed to providing LTC awareness and peace of mind so that more Americans have a plan in place to protect their family's well-being, retirement income and comfortable lifestyle in those "Golden Years."

Trina is a member of the National Association of Insurance and Financial Advisors (NAIFA) and shares the passion to protect the business of insurance and financial services. Trina served as former President Elect of the NAIFA Tallahassee and current First Vice President and Membership Chair for NAIFA Chicago, where she also lives downtown in the River North area.

Michelle Domino

Account Manager, LTCI Partners

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Michelle Domino is an Account Manager and Call Center Team Lead for the JMA/LTCI Partners Operations Center.

Michelle joined LTCI Partners as a sales associate in 2007. Since that time, she has taken on additional challenges and opportunities in a variety of roles in the sales, administration, and management of LTCI Partners' organization. Educating advisors and promoting the importance of long-term care insurance is her passion.

In her current position, Michelle leads the Group LTC team that supports the organization's largest and most prestigious corporate clients and universities. Michelle is responsible for all facets of internal client administration.

From case setup, to team training, enrollment, case management, and quality assurance, Michelle oversees all call center activities with a unique expertise, gleaned from her vast experience with both, group and individual LTC products.

Michelle is also a knowledgeable and informative speaker/trainer who has traveled extensively to educate both consumers and advisors at Conferences and Benefit Forums about the value of purchasing long-term care insurance.

Michelle is a graduate of Winona State University. She is fully licensed to sell long-term care insurance and partnership-trained.