

## > The most complete broker client lists in the industry combined with practical research toolsets to expand your sales team with top producers.



### OVERVIEW:

Find the top brokers in your territory with the most accurate information about what they sell, whom they sell to and whom they sell for.



- The most complete broker and carrier client lists are available for download



- Broker-centric research tools
- Custom market share calculations

## What is the Brokers and Carriers Market Share Database?

The Brokers and Carriers Market Share Database (BCMS) provides the most reliable intelligence on brokers' large group benefits clients and market share in the industry. BCMS starts with the broker and carrier data reported on employee benefits plans' form 5500s. That information is refined through our rigorous data cleansing processes that match more plans to more brokers than any other provider on the market. The result is far more accurate and complete insight into which brokers have relationships with the plans you wish to cover.

- > Identify brokers to recruit to sell your products, assess your market share versus other carriers, and analyze your competition in new markets.

Subscriptions are billed annually and vary based on geography and number of users.

## Connect with one of our knowledgeable reps today.

Call 800-231-0669, option 1 | Email [sales@judydiamond.com](mailto:sales@judydiamond.com)

Visit [www.judydiamond.com/BCMS](http://www.judydiamond.com/BCMS)



# What does the Brokers and Carriers Market Share Database include?

- The ability to download lists of large group benefits clients of individual brokers and carriers.
- Form 5500 data improved through rigorous data cleansing processes, which include:
  - Broker-Plan Matching Technology.
  - Broker and Carrier Name Standardization.
  - Broker Commission and Premium Modelling.
- Insight into lives covered, premiums written, commissions, and more, all per plan as well as in aggregate.
- More comprehensive mapping of the relationships between individual brokers, individual carriers, and individual plan sponsors.
- The ability to search by broker or carrier based on geography or other recruitment-oriented information. It's the difference between seeing all of the health plans in New York using Mercer and seeing all of the brokers selling health plans in New York. Only BCMS can show you the latter.
- The ability to instantly calculate customized market share values to easily identify top brokers or carriers, even in your most specific target markets.
- Fully exportable.

Custom Broker Market Share Analysis

Search Results Organized By **BROKER** SWAP RESULTS VIEW: View by CARRIER View by BROKER View by SPONSOR

Results Summary: Carriers: 195 Total Premiums: \$19,750,731,976 Health: 4,546 Brokers: 717 Lives Covered: 10,685,894 Dental: 665 Sponsors: 2,187 Average Premium: \$5,402,279 Life Insurance: 554

Your Search Parameters: Plan Type = Health Participant Count >= 250 Sponsor State = CA

Showing Actual Amounts

Displaying 1-50 of 717

Broker Name	Total Premiums	Lives Covered	Total Commissions	Total Fees	# Sponsors	# Carriers
Carrier-Direct Sales	59.25%	74.94%	-	-	561	118
AON	4.58%	2.08%	\$8,293,176	\$19,673	67	24
MERCER	3.70%	2.69%	\$17,809,022	\$563,366	160	33
HIGHMARK	2.98%	1.80%	-	-	24	5
WELLS FARGO	2.94%	1.45%	\$15,400,490	\$580,039	155	20

Viewing Details For **SPONSOR: TAYLOR MADE GOLF CO**  
5545 Fermi Ct  
Carlsbad, CA 92008-7324

Carriers Timeline: 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012

ACE AMERICAN INSURANCE CO  
AETNA  
CIGNA

Show All Carrier Timeline Data

Plan Name	Carrier	Lives Covered	Broker 1	Broker 2	Renewal Date	Total Premiums
Plan 501_Health_Dental_Rx Drugs_HMO_Indemnity	CIGNA	994	MERCER		12/31/2012	\$11,798,947
Plan 501_Vision	VISION SERVICE PLAN	994	Carrier-Direct Sales		12/31/2012	\$458,062
Plan 501_Life_Other/AD&D	SUN LIFE	1,000	MERCER		12/31/2012	\$335,062
Plan 501_Long-Term Disability	SUN LIFE	998	MERCER		12/31/2012	\$121,654
Plan 501_Other/Employee Assistance	EMPLOYEE SUPPORT PROGRAM	994	Carrier-Direct Sales		12/31/2012	\$31,162
Plan 501_Other/Lease	HYATT LEGAL PLANS	121	MERCER		12/31/2012	\$30,938
Plan 501_Health_Dental_Vision_Life	HAWAII MEDICAL SERVICE	4	Carrier-Direct Sales		6/30/2012	\$16,208

Basic Plan Sponsor Info

Search Results Organized By **CARRIER** SWAP RESULTS VIEW: View by CARRIER View by BROKER View by SPONSOR

Results Summary: Carriers: 195 Total Premiums: \$19,750,731,976 Health: 4,546 Brokers: 717 Lives Covered: 10,685,894 Dental: 665 Sponsors: 2,187 Average Premium: \$5,402,279 Life Insurance: 554

Your Search Parameters: Plan Type = Health Participant Count >= 250 Sponsor State = CA

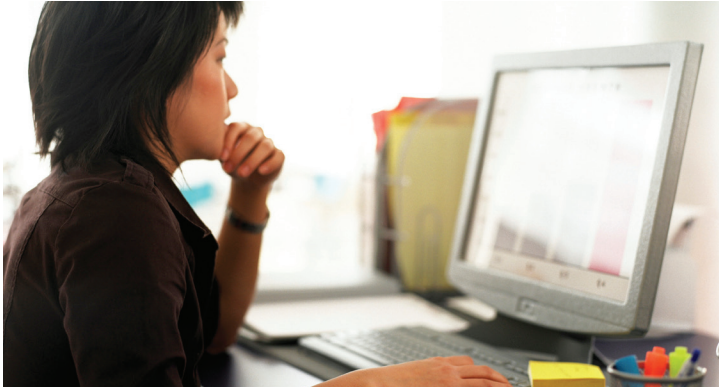
Showing Actual Amounts

Displaying 1-50 of 195

Carrier Name	Total Premiums	Total Commissions Paid	Total Fees Paid	Lives Covered	# Sponsors	# Brokers
KAISER FOUNDATION HEALTH PLAN	50.54%	\$32,310,079	\$430,291	24.75%	782	189
BLUE CROSS OF CA	8.68%	\$35,400,073	\$1,215,074	2.95%	400	112
AETNA	8.07%	\$34,112,053	\$2,578,310	4.46%	378	141
ANTHEM BLUE CROSS	6.28%	\$21,420,105	\$1,077,675	3.03%	227	104
UNITED HEALTHCARE	5.24%	\$13,797,924	\$530,156	3.11%	202	82
CIGNA	4.52%	\$19,592,599	\$1,031,224	9.19%	243	83
CALIFORNIA PHYSICIANS SERVICE	4.46%	\$19,368,427	\$997,401	4.07%	137	68
HEALTH NET	2.88%	\$7,819,800	\$224,299	4.02%	140	67
BLUE SHIELD OF CA	1.83%	\$8,102,498	\$168,625	0.61%	60	47

Carrier Market Share Analysis

## Who should consider using the Brokers and Carriers Market Share Database?



1. Insurance carriers looking to expand their sales channels by recruiting the brokers with the greatest market share in any given large group employee benefits territory.
2. Insurance carriers monitoring their market share by line of business, geography, plan size, employers' industry, etc.

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3. Insurance carriers or brokers that compare premiums and commissions with their competition.
  4. Insurance brokers committed to monitoring the market share of their competition.



### **Request a Free Trial**

Find out if the Brokers and Carriers Market Share Database is the right solution for your team's broker recruitment and competitive research needs.

**Visit** [www.judydiamond.com/BCMS](http://www.judydiamond.com/BCMS)



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