



CAMPBELL PHILLIPS PC
Attorneys at Law

To: Q-Life Board of Directors
From: Kristen Campbell, Campbell Phillips PC
Date: January 30, 2023
Re: Insurance Agent of Record

The Stratton Agency has been acquired by a national agency, High Street Insurance, headquartered in Michigan. Q-Life's long-time insurance agent of record, Breanna Wimber (associate of and successor to Mike Courtney) has since moved her practice to The Partners Group. The Partners Group is an Oregon/Washington insurance agency with a designated, robust public sector department. The Partners Group public sector department is led by Tom BeLusko who recently rejoined the private sector after several years with CIS. Q-Life has successfully relied on the collective discretion of Ms. Wimber and Mr. BeLusko for several years. Ms. Wimber will maintain a The Dalles office and Mr. BeLusko is based in Central Oregon. Partners Group has expressed a commitment to continue to prioritize Q-Life.

High Street Insurance has not demonstrated Oregon public sector experience and has not submitted a resume or references evidencing such expertise. Because of a non-solicitation agreement between High Street and Ms. Wimber (not The Partners Group) prohibiting Ms. Wimber from initiating contact with former clients, it is important to note that Q-Life initiated contact with Partners Group, through Mr. BeLusko.

Q-Life does not pay directly for insurance agent services. These services are included in a CIS premium. Further, our public contracting rules allow Q-Life to contract directly for insurance agent of record services given the high level of discretion and trust in that relationship. Accordingly, the Board can elect to: 1. Remain with High Pointe; 2. Transfer its file to The Partners Group; or 3. Solicit services from other insurance agencies, which would likely preclude the Partners Group since they are precluded from soliciting our work.

Staff for Q-Life has reviewed this matter and for the reasons set forth above, recommends transferring its file to The Partners Group. For this reason and given no legal prohibition from working with The Partners Group, counsel supports this action. Should the Board concur, proposed motion language is as follows:

I move to appoint The Partners Group agent of record for Q-Life's insurance services.