

LUNDY

INSURANCE SERVICES, INC.



Peace of Mind comes with a sound health plan and a rock solid retirement program from Lundy Insurance Services. We develop comprehensive health and retirement programs for individuals and businesses in San Diego County. Our plans are developed with extensive knowledge and experience, while our services are defined by honesty, integrity and respect.

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COMPANY OVERVIEW

Lundy Insurance provides comprehensive insurance and retirement planning services to clients in Southern California. With more than 23 years of dedicated experience in our unique field, we address our clients and prospects with the professional confidence you would expect and with the friendly and respectful approach you deserve. We sincerely strive to uphold our core principles and high ethical standards in our business and personal lives.

We provide valuable expertise in addressing the unique insurance and retirement needs of a diverse and growing group of businesses and individuals. We devise well-structured custom plans to fit your very specific needs and you will be thrilled with our ability to provide you with easy-to-understand options in an often complicated field.

Rest assured that we will approach your situation with a sense of urgency in order to deliver you the peace of mind that sound insurance and retirement programs can provide. And with more than two dozen leading carriers that we represent, we can do so in the most cost-effective and creative manner possible.

"I sincerely believe that our core values of honesty, integrity and respect for those we work with are the underlying reasons we have been able to be successful in a very competitive field of business," Lundy was quoted in the December issue of San Diego Business Healthcare Connection.

President, Erick Lundy founded the company in 2002 after working for almost two decades with several large insurance and brokerage firms, including Aetna and Cigna. A steadfast commitment to treating clients and colleagues with the same respect he expects in the business world helped him make a name in the industry. His experience and integrity have factored into the steady growth of the company, in the fields of small-business health care and retirement packages.



MEET THE OWNER

ERICK LUNDY, President

Erick's vast knowledge of the insurance industry, powerful family values, deep community connections and commitment to integrity serve him well in his role leading a company designed to enhance and protect the financial position of local families and individuals.

Erick is an avid outdoorsman and devoted family man. These are passions he frequently combines when he takes his wife and four children to the desert, fishing and camping. His status as an Eagle Scout often comes in handy on his many rugged family adventures. Erick has been married to Jamie for 22 years. The couple enjoys spending as much time as possible with their three sons, Ryan Blake and Davis and daughter Delaney.

One of his favorite destinations is the Lower Baja peninsula, an atmosphere he has recreated in the backyard of his Alpine home. His swimming pool and tropical landscaping remind him of his Mexican getaway spots, complete with a palapa bar and game area. Not surprisingly, he loves Jimmy Buffet music.

Erick was born and raised in San Diego. He graduated from University of San Diego High School in 1978 before attending San Diego State University. Armed with the B.S. in Finance he earned in 1984, he promptly began a career in the insurance industry. He worked with several large brokerage and insurance firms, including Aetna and Cigna. During this 18 year period Erick gained an extensive array of professional knowledge that he would later use to build his company.

In 2002, Erick elected to establish his own business and launched Lundy Insurance Services, which focuses on small-business health care and retirement planning. Over the past 6 years Lundy Insurance Services has grown to become a leading provider of health and retirement insurance services serving hundreds of businesses and individuals throughout San Diego County. Through his 23 years in the insurance industry and his professional and personal service to the community, Erick has become known as one of the most knowledgeable and personable insurance professionals in the community.

He recently moved his offices from Scripps Ranch to La Mesa to be closer to the East County community in which he is well connected. As a third-generation San Diegan, his local roots run ever so deep. He has further entrenched himself into the community with his widespread involvement in civic affairs.

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Erick is a member of the San Diego Association of Health Underwriters and is past president of the San Diego Employee Benefits Council. He serves the San Diego East County Chamber of Commerce as a board member, and is chair of the chamber's healthcare committee. He also is a board member of the Salvation Army Kroc Center and currently serves as a Business Advisory Council Member for the building of an East County Aquatics Center at Granite Hills High School. His dedication to serving people even extends beyond the boundaries of San Diego; numerous times he has gone to Mexico with his church to help build homes for those in need.



OUR PHILOSOPHY

At Lundy Insurance Services, we recognize that customer service is a critical aspect of any business. That's why we guarantee you will be treated with the same courtesy, respect and professionalism we would expect in our own business dealings. To ensure the friendliest atmosphere possible and help build lasting relationships, Lundy Insurance has adopted four core company principles that our employees strive to uphold each day:

- **CONSIDERATE:** A culture of respect is nurtured and always present among our teammates. Members of our own team are treated with respect and *consideration* for their own unique set of skills and personality. We believe this consideration transcends to our clients and those that we interact with in our lives.
- **COMPASSIONATE:** Although we are in business, we strive to recognize that we work with individuals in a broader sense. We treat our clients as we would want to be treated. We know that our clients are mothers and fathers; we treat them as we would want our own mothers and fathers treated. We realize that as we take this approach all of our clients will be served with the care and respect they deserve. Being *compassionate* is the highest of ethical principles and just plain good business.
- **CONSCIENTIOUSNESS:** We take pride in our work and approach it with *conscientiousness*. We always give our best effort and understand that "good enough" never is. There is always room for improvement in everything we do. Nothing will ever replace hard work in moving forward in life and in personal achievement.
- **COMMUNITY CITIZENS:** We aim to be good *community citizens*. We take the opportunity to engage and help our community to improve and become a better place for all of us. Be it helping those in need, getting involved in the arts and cultural activities, or actively participating in community needs and issues, we recognize that each of us makes a difference in our neighborhoods. We encourage others to "get involved".



SERVICES WE PROVIDE

Employee Benefits

- Medical
- Long Term Disability
- Short Term Supplemental Disability
- Life
- Dental
- Vision
- Section 125
- Health Savings Accounts
- Health Reimbursement Arrangements

Business Retirement Planning

- 401 K
- SEP-IRA
- Simple IRA
- Defined Benefit Pension Plans
- Executive Non-Qualified Deferred Compensation

Business Insurance

- Workers Compensation
- Business Liability
- Employment Practices Liability
- Directors and Officers Liability
- Commercial Auto

Individual

- Health
- Life
- Disability
- IRA
- Roth IRA
- Annuities



CARRIERS WE REPRESENT

You can rest assured that Lundy Insurance Services can find just the right program for you, your family and your employees. Not only does it have the experience and knowledge to construct an ideal plan for its clients, but it has access to more than 25 leading carriers nationwide. Greater choices mean more options which leads to better deals and more appropriate plans.

Here is a partial list of carriers Lundy Insurance Services represents:

- Aetna
- AFLAC
- Blue Cross
- Blue Shield
- Cal Choice
- CIGNA
- Colonial
- The Hartford
- Health Net
- Humana
- John Hancock
- Kaiser
- Lincoln
- MassMutual
- Nationwide
- PacifiCare
- Principle
- Prudential
- Principal
- Premier Access
- SafeGuard
- Sharp
- SIMNSA
- United
- UNUM