

# MEET OAKBRIDGE ADVISORS

OakBridge Advisors provides **Employee Benefits**, Retirement Plans and Asset Management to Companies, their Executives and High Net Worth Individuals.

OakBridge Advisors was founded by entrepreneurs with more than 60 years of combined experience in insurance and financial services. A principal owner heads each of our three divisions. These seasoned professionals work together to provide you with cohesive, integrated solutions.

OakBridge Advisors takes a consultative approach to designing and implementing benefit plans. We put together a custom suite of products that meet your company's unique needs -- no commodity, off the shelf plans here. Where appropriate, we integrate superior technology to improve benefits and human resource administration. Our philosophy of total customer care is carried throughout the planning, implementation and management of your

benefits. You can count on OakBridge Advisors to be with you every step of the way.

We know you care about the quality and financial security of your employees. That's why we design and implement employee benefit and compensation plans that promote the economies of scale that multiple line relationships provide. This enables you to offer the best for less.

OakBridge Advisors is pleased to have received numerous endorsements from our clients due to our superior cost-effective employee benefit programs and unparalleled customer service.

## OakBridge Advisors and You

We take a uniquely holistic approach to company employee benefit plan design. Our experts work with your executive team and human resource professionals to customize plans to your company's unique needs. Our process enables you to focus on your business while we keep watch over an ever changing and highly competitive benefits and compensation marketplace.

## Value and Dedication

Our dedicated service managers are here to assist you, your trustees and your employees. We investigate claim problems, assist with employee enrollment, employee changes and offer investment advice when needed. We create a positive experience that helps build appreciation, morale and good will for your company through the benefit plans you offer.

OakBridge Advisors offers the following plans for Companies, Executives and High Net Worth Individuals:

- Medical Insurance (Traditional and Self-Insured)
- Dental Insurance
- Disability Insurance
- Life Insurance
- Defined Contribution, 401(k) & Profit Sharing Plans
- Defined Benefit Pensions
- Deferred Compensation
- Supplemental Executive Retirement Plans
- Corporate Owned Life Insurance
- Corporate Long Term Care Insurance
- Salary Continuation Agreements
- Asset Management
- Estate Planning
- Financial Planning