

# 2020 Affluent Markets Virtual Annual Meeting

October 20-21, 2020

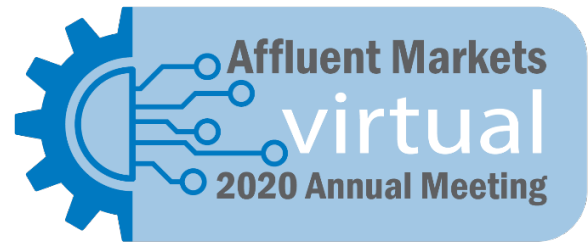


# Business Update

Rob Carney, President  
Crump Life Insurance Services



THANK YOU



# Thoughts About 2020 (so far)

- ✓ Pandemic
- ✓ Earthquake
- ✓ Bees
- ✓ Wildfires
- ✓ Hurricanes
- ✓ Volatile Stock Market
- ✓ Historically Low Interest Rates



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- ✓ Volatile Stock Market
- ✓ Historically Low Interest Rates
- ✓ **Need for Life Insurance and Related Products Increased**



**We are part of  
something  
bigger!**

# We Are Truist Financial Corporation



**Successfully closed**  
merger of equals  
between BB&T and  
SunTrust



**Largest** financial  
institution merger in  
more than 15 years



**275+** combined years  
of serving our clients  
and communities



**6<sup>th</sup> largest** U.S.  
commercial bank by  
assets and market  
value



**#2 weighted average  
deposit** rank in Top 20  
MSAs

**\$473.1B** assets  
**\$76.5B** market value



**~10 Million** households

**~59,000** teammates



Headquartered in  
**Charlotte, N.C.**

Source: Truist 1Q2020 Earnings Call



**TRUIST**

Slide 7



# HH Truist Insurance Holdings

Truist Insurance Holdings operates a portfolio of **leading risk and insurance businesses** providing solutions and trusted advice to clients through **efficient distribution, local relationships, and data-driven insights** across the risk spectrum



**Strong heritage; founded in 1922; successfully integrated more than 100 acquisitions**



**Differentiated culture supportive of growth and client outcomes**



**\$27B in Premiums; 7th largest broker worldwide**



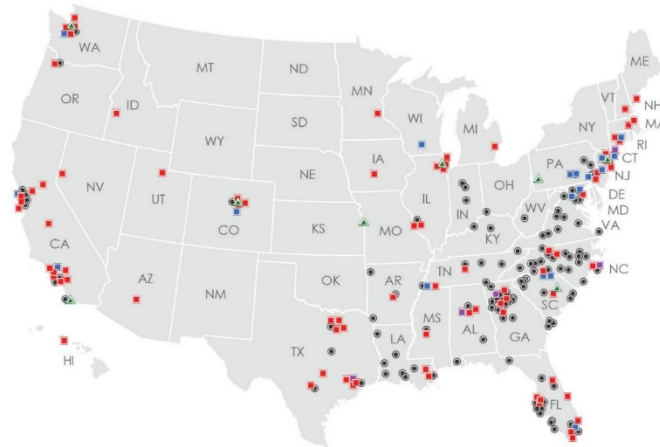
**Access to permanent capital as part of BB&T**



**Top-tier relationships with the world's leading insurers**



**Strong US presence; 250 offices; 7500+ associates**



Truist Insurance Holdings, Inc.

Retail Location



Wholesale

AmRisc, LLC



CRC Group



Crump Life



Premium Finance



Location





# Truist Insurance Holdings

## RETAIL DIVISION

More than 3,800 teammates providing a full array of brokerage and risk management products and services, with unparalleled service and expertise

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## WHOLESALE DIVISION

More than 3,400 teammates offering data-driven insights and expertise for brokers and insurers across the full spectrum of life, property and casualty risks

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Property, casualty, professional and specialty



MGU for commercial property risks; leading provider for wind capacity



Life, annuity, LTC, DI and impaired risk

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## PREMIUM FINANCE DIVISION

More than 240 teammates delivering customized premium finance solutions for agents, brokers, and their clients



# Results



# Strategic Planning External Assessment

**Legislative/Regulatory**

**Political**

**Suppliers/Carriers**

**Clients/Consumers**

# Crump's Strategy

**BUSINESS DEVELOPMENT**



**INVESTMENTS IN PEOPLE  
AND TECHNOLOGY**



**INDUSTRY LEADERSHIP**



# Exploring Marketing Opportunities



# THANK YOU