

Why Bolton?

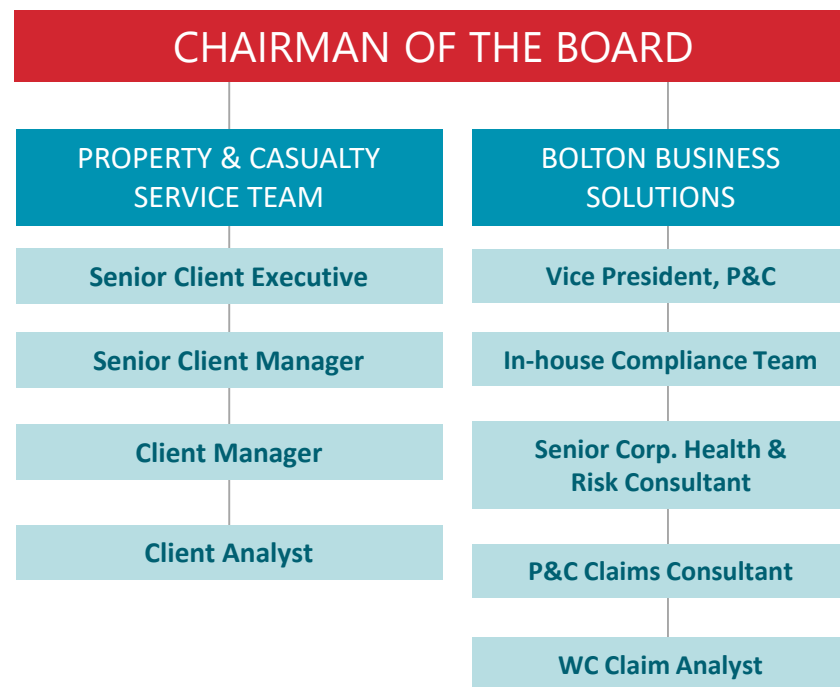
For more than 30 years, Bolton & Company has demonstrated an unwavering commitment to serving the needs of schools. With over 145 clients nationwide, we have developed a deep understanding of the unique culture that makes private, independent, charter schools, colleges and universities special, and we are committed to addressing the ever-evolving challenges these operations face. Key highlights include:

- Chairman and Director of Education Practice Group served on the NBOA Board for 6 years and Recipient of the 2020 Sarah Daignault Outstanding Support of Independent School Award
- Enterprise Risk Management focus
- Ancillary Services
- Forensic Audit
- Consulting in all areas of risk management and insurance
- Claim Management
- Technology Resources

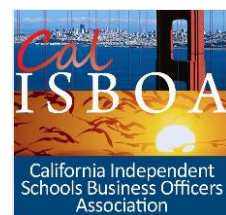
Service Team Structure

With one of the nation's largest Education Practice Groups, Bolton focuses on supporting your school's mission and financial goals through a comprehensive and holistic approach.

We develop and administer risk management, property & casualty and employee benefits programs that support your objectives and address your challenges. Our team of consultants provide unparalleled support and serve as an extension of your business office—so you can focus on overall school operations, curriculum and student development.



Bolton is actively involved with the following associations:



Your Educational Institution—Championed By Bolton

Bolton's Education Practice Group has established itself as a premier provider of risk management, insurance, employee benefit solutions and retirement plan services for private and independent schools, charter schools and higher education institutions. We make it a point to develop a deep understanding of your school's specific mission and purpose, and we have invested the time, resources and intellectual capital to deliver best-practice solutions.



Our Unique Approach

- A comprehensive forensic and physical audit of the school's insurance and risk management program
- Peer-to-peer benchmarking
- Education-specific seminars and webinars on risk management, compliance and governance

Proprietary Insurance Programs

- Workers' Compensation
- Cyber Liability
- Earth Movement/Flood
- Excess Liability
- Student Accident

Education industry consultants at your service.



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Ensuring the Long-term Well-being of our Education Clients

We believe that to offer superior service to schools, colleges and universities, we must be dedicated to understanding their diverse needs and develop innovative and specialized programs that serve their unique qualities. Bolton also believes it must emulate the same values of the clients we serve by offering ethical service with integrity, professionalism and creativity.

Beyond providing the traditional products and services that would be expected to support a school's insurance and risk management needs, we have consistently sought to provide additional value propositions to enhance our overall program structure:

FINANCIAL	REPUTATIONAL	OPERATIONAL	HUMAN RESOURCES
<ul style="list-style-type: none"> General Asset Preservation Internal Financial Controls Capital Campaigns Budgeting 	<ul style="list-style-type: none"> Catastrophic Event Response Media Access and Response Social Media Practices and Policies Disgruntled Parents/Employees 	<ul style="list-style-type: none"> Management of Confidential Information Third Party Facility Use Field Trips/Outdoor Education/Camps Bullying/Hazing Student & Campus Safety 	<ul style="list-style-type: none"> Employment Practices Hiring/Training Turnover Regulatory/Compliance Sexual Misconduct & Abuse Performance Evaluations
TECHNOLOGY	GOVERNANCE	COMPLIANCE/LEGAL	SAFETY & SECURITY
<ul style="list-style-type: none"> Environmental Loss Inadequate infrastructure Unauthorized Recordings Data Loss Cyber Risk 	<ul style="list-style-type: none"> Conflict of Interest Management Ethics and Values Risk Evaluation Fiduciary Responsibilities Succession Planning 	<ul style="list-style-type: none"> Data Security New Regulations Disability Accommodations Recruiting Violations for new students Privacy Violations 	<ul style="list-style-type: none"> Active Shooter Drowning Fire Natural Disaster Sex Offenders on Campus Access to School Campus

Insurance and Risk Management Forensic Audit

We are proactive in working to anticipate risk management exposures that can impact a school's financial model and their long-term sustainability.

One of the cornerstones of this process is our conducting a forensic risk management audit on behalf of the client. This audit process allows us to develop a baseline of PAISBOA Member Schools' current program by which we can then have strategic conversations about how we can work with them to manage operational, financial and governance risk.

The proprietary forensic risk management audit process is unique within our industry and reflects a "best practices" approach to identifying and managing risk. This allows us to uncover certain exposures that may have been otherwise missed and to create a manuscript narrative of the school's current program with best practices recommendations and peer benchmarking data. This then establishes a platform for the school administration to launch meaningful dialogue within the school and to take a proactive, informed role in how they manage their risk in partnership with our organization.

Property & Casualty and Risk Management

Our property & casualty and risk management consultants help identify and minimize your school's exposures to safeguard your students, faculty, staff and assets. They help identify areas where existing coverage and claims are negatively impacting your organization's bottom line—and what you need to do to address them.



Risk Index Worksheet

Hazard	Frequency	Magnitude	Warning	Severity	Risk Priority
	4 Highly Likely 3 Likely 2 Possible 1 Unlikely	4 Catastrophic 3 Critical 2 Limited 1 Negligible	4 Minimal 3 6-12 hours 2 12-24 hours 1 24+ hours	4 Catastrophic 3 Critical 2 Limited 1 Negligible	<ul style="list-style-type: none"> High Medium Low
	4 Highly Likely 3 Likely 2 Possible 1 Unlikely	4 Catastrophic 3 Critical 2 Limited 1 Negligible	4 Minimal 3 6-12 hours 2 12-24 hours 1 24+ hours	4 Catastrophic 3 Critical 2 Limited 1 Negligible	<ul style="list-style-type: none"> High Medium Low
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InsureTech Solutions



ThinkHR, provides practical, professional Human Resources (HR) services for employers to help with the issues that every business confronts in today's competitive environment.



Leveraging the industry's largest library of more than 10,000 applications and insurance forms, Indio simplifies the insurance application process to make it faster, easier, and more collaborative, while minimizing errors and omissions and saving both time and money.



Safe Schools offers a suite of online safety and compliance programs and includes easy-to-use solutions for staff and student training, tip reporting, safety data sheets and chemical management, and incident management.



Passport is a proprietary online application developed by Assurex Global.