

EXECUTIVE BENEFITS CONSULTANT**EMPLOYEE BENEFITS ■ BUSINESS DEVELOPMENT ■ ACCOUNT MANAGEMENT**

- Insightful benefits consultant with the ability to engage in high-level problem solving, creative collaboration, honest/open discussion, solid solutions for cost-containment and professional implementation through dedicated personal service.
- Offers solid solutions for cost containment and professional implementation through dedicated personal service.
- Actively develop and maintain a resource centered professional network. Offered independent due diligence analysis for quantifying savings opportunities prior to engagement. Recommend plan designs to help achieve client objectives.
- Advise clients on creative plan design and funding alternatives for containing costs on the #2 spend behind payroll – employee benefits.
- Strong business experience drives value to consulting clients with thorough review and analysis of existing programs, and planning partnership to identify solutions.
 - Effectively interact with other practice areas, including legal, audit, tax & independent consultants.

"John Daly is by far the most professional and talented and fiscally effective group benefits broker we ever met. When other benefit brokers call us, we tell them we are absolutely thrilled with our current broker, and there is no need for them to call again. We love this guy!"

--Non-profit CEO (450 employees)

SALES SUCCESS AND STRENGTHS

- Deliver Strong Client Centered Results
- Loyal Relationship Management Skills
- Leader in Defined Contribution Medical Plans
- Technology Integration
- Cost Savings/Problem Resolution
- Creative Plan Design Strategies
- Entrepreneurial Leadership
- Strong Communication/Formal Presentations

- Qualified/Non-Qualified Plan Design
- Increase Retirement Plan Participation
- Methodical Interview Process Uncovers Critical Business Needs
- Strong Communication/Formal Presentations
- Design Key Employee Reward & Retention Plans
- Managed Staff to Exceed Client Expectations

EXECUTIVE CAREER HISTORY**1987 to 2015: Daly Merritt, Inc., Wyandotte, MI - AGENCY PRINCIPAL & EXECUTIVE VICE-PRESIDENT**

Joined the family-owned insurance agency, and played a key role in corporate growth. Drove corporate development to expand the Life & Benefits Division from a medical insurance sales focus to a wide array of group benefit products and services. Presented a dedication to enhancing the relationship between employers and employees through the development and implementation of high quality, cost effective group insurance programs. Assisted business owners and professionals in addressing personal and business exposures via risk-based insurance products.

Established and maintained long-term business relationships utilizing a legal and professional background to collaborate with clients on complex insurance plan design and cost-containment issues. Built strong relationships with select insurance carrier representatives in each product category. Delivered comprehensive consulting services, including technology integration, human resources, payroll, online benefits enrollment, healthcare

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reform guidance and independent broker selection. Developed collaborative relationships with Michigan municipalities to create synergies among industry peers. Early adopter of defined contribution medical plans. Invited to present defined contribution GlidePath experiences to Blue Cross Key Account Sales & Service Team. Worked with Pension Actuaries to offer defined benefit funding options for future retiree healthcare obligations. Offered defined benefit funding alternatives, and conservative plan document amendment options for funding future retiree healthcare obligations.

- Successfully grew the Life & Benefits Division by adding value at the client level through technology integration and consulting services.
- Effectively served clients with 100 to 2,500 employees and increased client satisfaction scores.
- As the Life & Benefits Division Manager, also remained close to clients by continuing to handle the largest personal book of business in a 70 person office.
- Contributed client solutions in cost-cutting initiatives, including implementing creative money-purchase defined contribution platforms for group medical plans.
- Partnered with multiple technology companies to enhance client services. Forged one of the few formal “Broker Partner” relationships with the Nation’s largest payroll provider -- ADP.
- Worked closely with large employers concerned with additional cost exposure due to the Affordable Care Act; advised on product selection to offer group benefit plans on and off exchange while meeting quality and budget objectives.
- Engaged in staff recruiting, hiring, training and development, to better serve our client base.
- Joined the agency in embracing a “paperless” initiative, enhancing client service while reducing staff costs and more effectively managing confidential client data.
- Redesigned the Life & Benefits marketing strategy, focusing on technological promotion to better serve our clients.
- Led the Life & Benefits Division to prominent recognition as part of the “Fastest Growing Agency” in 2014’s Crain’s Business Ranking from Among Detroit’s Top 25 Largest Brokers.

“When we needed solutions for our 2,500 employee group benefit program, we worked with John Daly in a true partnership for over 18 months to address plan design problems lingering from decades past. Together, we designed a creative and cost-effective long-term solution. The cost savings were very substantial, and both our staff and employee satisfaction levels were up dramatically. John is a true partner.”

--Automotive Industry CFO (2,500 employees)

PRIOR CAREER HISTORY

Procter & Gamble Distributing Company, New York, NY
Surgical & Patient Care Products Divisions, Sales & Sales Management

EDUCATION

Juris Doctor, University of Detroit Mercy School of Law, Detroit, MI
Admitted - State Bar of Michigan (non-practicing attorney)
Bachelor of Business Administration, Western Michigan University, Kalamazoo, MI

LICENSES AND REGISTRATIONS

Licenses: Life, Health and Accident Insurance, Life Insurance Counselor (LIC)
FINRA Registrations: Series 6 Investment Company Products, Variable Contracts Representative Exam; Series 63 Uniform Securities Exam; Series 66 Uniform Combined Exam; Series 7 General Securities Exam;
SEC Registrations: SEC Investment Advisor, Investment Advisor Representative - Eagle Strategies, LLC;

[HTTPS://WWW.LINKEDIN.COM/IN/JOHNLDALY](https://www.linkedin.com/in/johnldaly)

AFFILIATIONS

Board Member - Oakwood Southshore Hospital (Beaumont Health), Trenton, MI; (2010-Present);
Joint Conference Committee - Oakwood Healthcare System (Beaumont Health), Dearborn, MI (2010-Present);
Board Chair - The Guidance Center, Southgate, MI (2014-Present)
Board Member - The Guidance Center Systems, Southgate, MI (2000-Present);
Board Member - Adult & Family Services, Southgate, MI (2000-Present);
Annual Supporter: Various Non-Profits.