

MCM

A Member Firm of M Financial Group

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Q Briefly describe your firm, its offerings and its mission statement.

Founded in 1961 by John Meisenbach, MCM has grown to become one of the largest privately held benefits consulting and insurance brokerage firms in the Northwest. Our growth is attributable to our focus on developing mutually successful long-term relationships with the individuals, families and businesses we serve.

As an industry leader in insurance advisory, employee and executive benefits, and retirement planning, MCM takes a client-centered approach to consulting. Our mission is to advise organizations and high net worth individuals in developing and implementing long-term strategic solutions that meet their personal and business goals. Whether you are a high net worth individual, a small but growing company, or a larger, more established business, MCM has the demonstrated ability to listen, create, and successfully implement your benefit, retirement, or insurance strategies. We provide clients with a number of unique advantages and set high standards for expertise and personal service. We believe in continual improvement and innovation in the products, processes, and services we provide our clients.

MCM is a Member Firm of M Financial Group, one of the nation's premier financial services design and distribution companies.

Q Describe your insurance strategy and how it might be unique.

MCM knows that successful insurance solutions require depth of expertise, creativity, and consistency over time to meet the needs of businesses and high net worth individuals. As a Member Firm of M Financial, we deliver customized—and sustainable—insurance solutions, supported by proprietary products priced for the high net worth market, reinsurance, and an unparalleled commitment to inforce management. Our access to products built using the superior experience of the affluent clients we serve, and our core principle that our last client, is as important as our next client, continues to differentiate our firm. Further, the MCM team of experienced professionals provides each client with individual attention and expert advice to maximize the effectiveness of our insurance solutions.

Q What do you consider to be the most important factors when evaluating an advisor?

We believe it is the advisor's responsibility to create, implement, and maintain strategies that successfully address a client's goals now and in the years to come. To achieve this with effectiveness and efficiency, a collaborative effort is critical. Shared values are also important—MCM maintains strategic relationships built upon mutual trust, a dedication to excellence, integrity in business practices, and most of all, a commitment to clients. With this foundation as a starting point, we are able to forge partnerships with firms offering services that complement the insurance advisory expertise we provide. MCM is part of a team where diverse perspectives and ideas are shared, but the focus is always on the client's best interests. The result: mutually beneficial relationships that last, deliver value to our clients, and exceed expectations.

Q How has your firm adapted during the recent economic downturn, and what new opportunities have developed for your firm and your clients?

In any economic climate, knowledge is power, but in today's environment, it is even more critical to stay on top of market trends, legislative/regulatory developments, and the latest products. MCM remains committed to delivering information, insight, and expertise that facilitate informed decisions, while providing high touch service that can't be matched. Our clients know that we have our finger on the pulse of the insurance industry—monitoring carrier ratings and financials, assessing product competitiveness, and seizing opportunities that make a difference for clients during a difficult cycle. MCM is also focused more than ever on innovation, identifying new, more efficient solutions for our clients, while refining plans in preparation for the next phase of the cycle. In this period of uncertainty we are working hard to help our clients understand the value of the opportunities available and the benefits of moving forward.

AT A GLANCE

- Ownership of firm: John W. Meisenbach
- Office location(s): 2 (Seattle and Bellevue, WA)
- Number of employees: 50
- Average Wealth Transfer Client Net Worth: \$25-50 Million
- Death Benefits Under Management: \$3 Billion
- Insurance advisor/client ratio: 2/1
- Broker/Dealer affiliation: M Holdings Securities, Inc., member FINRA/SIPC