



CAPABILITY STATEMENT

CORE COMPETENCIES

American Trustee of Florida is a full service health and life insurance broker. We are conveniently located in Rockledge, Florida, and have been providing insurance products in Brevard County and Central Florida since 2019. We work with employer groups and individual applicants, and have access to one or more carriers in each category, as applicable.

Services we provide for Business Owner:

- ✓ **COMBINED/SIMPLIFIED BILLING**
- ✓ **SECTION 125 CAFETERIA PLAN**
(at no additional cost, in most cases)
- ✓ **ONLINE ENROLLMENT PLATFORM FOR EMPLOYEES**
- ✓ **CALL CENTER CAPABILITY**
- ✓ **FSA, HSA, HRA**

EMPLOYEE BENEFITS:

- Health
- Legal Protection
- ID Protection
- Long Term Disability
- Telemedicine

BUSINESS OWNER BENEFITS:

- Buy-Sell Agreements
- Key-man Insurance
- Executive Bonus Plans
- Exit Strategies

COMPANY DATA

DBE, MBE CERTIFIED

Florida State Certified with 215 License for Health, Life and Annuities since 2016, and Medicare.

NAICS: 524210

DUNS: 117563623 | **CAGE:** 909Q7

CONTACT INFO

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DIFFERENTIATORS

- Client needs are our number one priority.
- Consultative approach to each and every client
- Timely response to all client inquiries and issues
- Honest service with integrity

PAST PERFORMANCES

Set up and implemented various Health Plans, Dental/Vision/Basic Life & Supplemental Plans, and Life & Health Insurance Plans for the following clients:

- **COOL RAYS AIR CONDITIONING AND HEATING, LLC**
- **CITY OF OAK HILL**
- **PRIVATE INDIVIDUAL PLANS**

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