

BROKER ACCOUNT MANAGERS

Benefits for EXIM
Registered Platinum
and Gold-Tiered
Insurance Brokers



EXIM Broker Account Managers:

A BAM'S ROLE

Broker Account Managers, or BAMs, are assigned to EXIM registered brokers who have achieved Platinum or Gold-tier status with EXIM. Their role is to assist the broker with EXIM programs by focusing on partner needs and opportunities.

Broker Account Managers work one-on-one with brokers to:

- ✔ Develop business plans to expand outreach to small businesses and attract new prospects.
- ✔ Assist brokers with access to EXIM resources (*see below*) and ensure a first-class experience with EXIM

Note: Broker Account Managers do not intervene with active cases in EXIM's underwriting department. Brokers should use the latest EXIM Export Credit Insurance organizational chart in the EXIM Partner Portal to escalate any cases in progress.

Benefits by Tier	Platinum	Gold
Personalized Training	Yes	Yes
Event Support	Yes	Yes
Marketing Collateral & Content	Yes	Yes
Marketing Campaigns	Yes	Yes
Partner Portal Access	Yes	Yes
Lead Distribution	Yes	Yes
Incentive: 10% of Jul-Jun Commissions Paid*	Yes	
Incentive: 7% of Jul-Jun Commissions Paid*		Yes

* Incentive commissions are paid in the July or August commission statement.

SUPPORT BENEFITS

Personalized Training

Objective:

To provide top-tiered brokers with training about EXIM's products and doing business with EXIM.

Ongoing training is available to new and existing employees, including:

1. EXIM 101 training
2. EXIM Online (EOL)
3. Training for internal partners (salespeople, loan officers, insurance specialists) within larger P&C organizations and banks
4. Onboarding and access to the EXIM Partner Portal
5. Introduction to EXIM's processes and procedures

Event Support*

Objective:

Provide a trade credit expert from EXIM who is available to attend events with the broker, identify prospects, develop referral sources, and facilitate networking.

Other event support includes up to 50 printed copies of co-branded EXIM marketing materials for each event.

** Available only when in-person attendance is permitted by EXIM management.*



MARKETING & RESOURCES

Collateral & Content

Objective:

Provide EXIM registered insurance brokers with access to co-branded marketing content for distribution to current and prospective export customers and referral sources.

Benefits include:

1. Building awareness of EXIM solutions for trade finance
2. Assisting a prospect in choosing the most appropriate policy
3. Providing current customers detailed information about their policy

Marketing collateral includes brochures, whitepapers, infographics, PowerPoint templates as well as a social media guide and social media assets needed to develop an online presence promoting EXIM products.

Partner Portal Access

Objective:

Provides brokers access to digital information, education, and support including:

1. Co-branded marketing collateral and a request form for new collateral materials
2. Access to frequently asked questions (FAQ's) and a resources section
3. Public community board to post questions and comments to EXIM BAMs and peers
4. Performance dashboards to privately track and view opportunities



To view the Partner Portal, visit:

<https://eximprm.force.com/prmcommunity>

Lead Distribution

Objective:

To extend outreach to small business exporters.

Fully vetted and pre-qualified leads will be distributed to Platinum and Gold brokers through the Partner Portal. Leads are distributed using automated workflow criteria based on a partner's eligibility status with EXIM. Lead status is reported by brokers through the portal.



FINANCIAL BENEFIT

Incentive Commission

Objective:

Compensate brokers for providing valuable services to small and medium sized businesses.

At the end of the July-to-June annual year**, the broker will receive a percentage of all of their commissions paid on short and medium term TCI policies. This incentive is:

10%

for Platinum brokers

7%

for Gold brokers

** Incentive commissions are paid in the July or August commission statement.



This is a descriptive summary to be used only as a general introductory reference tool. The complete terms and conditions of the policy are set forth in the policy text, applications, and endorsements.