



Insurance Associates

Bringing *"The Solution"* to the table to protect your portfolio and your business.

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Our Focus

CP Insurance Associates (CPIA) specializes in lender placed insurance and full-service insurance tracking, tailored to your loan portfolio. We are a progressive organization maintaining the highest levels of service and efficiency by incorporating industry leading technology, market knowledge, and a superior service mentality to meet the expectations of our growing client base which includes credit unions, mortgage service companies, and hard money lenders.

Our Products

Collateral Protection Insurance

Provide Insurance Tracking of Auto, Hazard, Wind, Flood, General Liability, REO, and Equipment (Any Size Portfolio)

- Multi-collateral tracking
- Image repository of borrower documents and notices available for review 24/7
- Provide deficiency notifications for lender verification

Issue Lender Placed Insurance

- Automatic coverage protection available on eligible tracked collaterals
- Insurance limits, coverages, and deductibles customized to client portfolio
- Coverages available for all related real estate and moveable collateral

Blanket Single Interest

Mortgage Impairment Coverage

Credit Life and A&H Insurance

Payment Protections

Credit Disability Insurance

Our Services

Customer Service (In-House Call Center)

Lender Services Group (Dedicated Account Reps)

Escrow Tracking (Payment Distribution Options)

Vendor Management Reporting

- Portfolio Metrics

Conversion & Post Conversion Support

Insurance File Input to Core Platform

Private Flood Certification

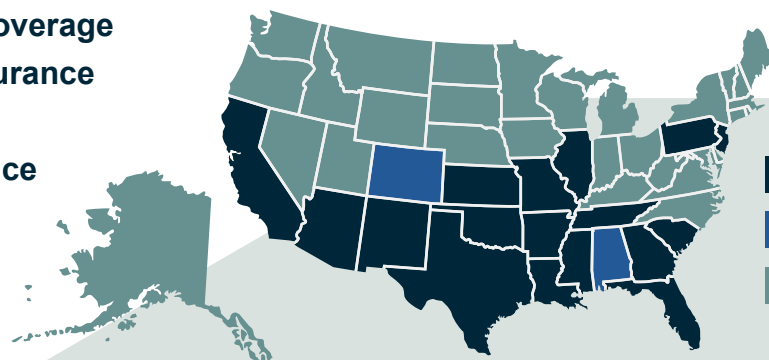
Customizable Portfolio Reporting

Flood & Earthquake Tracking

Produce Uninsured & Compliance Notices

Online Access to Software Portal

Electronic Data Interchange (EDI)



- Current States Served
- Target States for Growth
- Licensed in All 49 States in the Continental U.S.

Solutions: Tailored for Your Success



Financial institutions of all types face unique risks in their daily operations due to comprehensive regulatory guidelines. Safeguarding your financial institution with professional insurance coverage protects the people and assets that matter most.

We partner with you to ensure your investments and assets are protected. You can stay focused on building your future, knowing that CPIA has you covered. Our team will find the products and services you need with top rated insurance carriers and providers.



Professional Product Lines

Professional Lines

- D&O Liability
- Cyber Security
- Employment Practices Liability
- Professional, Trust & Lender Liability
- Financial Institution Bond

Property & Casualty

- Property & General Liability
- Business Auto
- Workers Compensation
- Flood
- Repossessed Property

Specialized Policies

- Kidnap Ransom & Extortion
- Financial Institution Card Protection
- Bonds – Stamp, Notary, Lost Instrument, Other

Compliance Services

SSAE audit performed annually

Loan data access via secure web portal

Data transfer via secure transfer portal

Annual cyber security review

Complete compliance package provided

Affiliated Services

Tax Tracking with Coforge

Search and Set UP

- Property legal description search | Double blind search on loan valued >\$20M Final collateral report

Escrow Tax Reporting

- Bill request sent to Taxing Authorities 90-120 days prior to economic loss date (ELD)
- Tax reporting done ~21-30 days prior to ELD
- Customized reporting

Non-Escrow Tax Reporting

- Tax reporting completed within 30-45 days after the tax due date
- Tax payment validation completed within 90 days
- Delinquent taxes reported and revalidated at the next tax installment until the delinquency is cured

RETS Web

- Web-based portal for reviewing information
- Reviewing and printing any tax receipt, tax bill, legal description, and payment package for any loan or property