

FT PARTNERS FINTECH INDUSTRY RESEARCH

April 1, 2019

INSURTECH CEO INTERVIEW:

INSURIFY

with CEO Snejina Zacharia

**Auto, Home and Life Insurance
Platform**

Overview of FT Partners

- Financial Technology Partners ("FT Partners") was founded in 2001 and is the only investment banking firm focused exclusively on FinTech
- FT Partners regularly publishes research highlighting the most important transactions, trends and insights impacting the global Financial Technology landscape. Our unique insight into FinTech is a direct result of executing hundreds of transactions in the sector combined with over 17 years of exclusive focus on Financial Technology

FT Partners' Advisory Capabilities



FT Partners' FinTech Industry Research

FINTECH RESEARCH & INSIGHTS

- In-Depth Industry Research Reports
- Proprietary FinTech Infographics
- Monthly FinTech Market Analysis
- FinTech M&A / Financing Transaction Profiles



The Information

Named Silicon Valley's #1 FinTech Banker (2016) and ranked #2 Overall by The Information



Ranked #1 Most Influential Person in all of FinTech in Institutional Investors "FinTech Finance 40"



THE M&A ADVISOR

Numerous Awards for Transaction Excellence including "Deal of the Decade"

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Insurify Overview

Company Overview



CEO: Sneijna Zacharia

Headquarters: Cambridge, MA

Founded: 2013

- Insurify offers an online insurance comparison, shopping, and management platform
 - To-date the Company has written over \$80 million of policy premiums
- Insurify utilizes artificial intelligence and patented tech to simplify the shopping experience and provide the most affordable coverage for the consumer
 - Insurify leverages A.I. on its proprietary RateRank™ platform to connect the shopper with quotes from insurers that fit their needs
- Insurify is currently licensed and operating in all 50 states

Management



Sneijna Zacharia
Founder & CEO



Giorgos Zacharia
Co-Founder



Steven Moseley
Head of Engineering



Tod Kiryazov
Head of Product



Jeff Kandel
Director of SEO



Hayden Broberg
Director of Partnerships

Products & Services

Compare Personalized Quotes

Answer a couple of questions, Insurify will provide live quotes

Get All Discounts in One Place

Get all the discounts you qualify for in one place and find out which insurer will provide average savings of \$489

Buy Online or on the Phone

Get the policy you want, buy online or schedule a call with an agent

Selected Carriers



Financing History

Date	Size (\$ mm)	Selected Investor(s)
10/06/17	\$5	MassMutual Ventures; Nationwide Ventures
01/28/16	2	Rationalwave Capital Partners, Giorgos Zacharia, George Kassabgi

Comparing quotes is fast and easy with Insurify!

1 car1 person

Edit Coverage

Progressive

Progressive

\$42/mo

MetLife

MetLife

\$51/mo

Free cancellation!

Liberty Mutual

Liberty Mutual

\$56/mo

No pre-payment needed

Mercury

Mercury

\$67/mo

Foremost Insurance

Foremost Insurance

\$71/mo

Popular carrier

Safeco

Safeco

\$82/mo

The General

The General

\$179/mo

80 Years of Service & Affordable Insurance

CHECK RATES

INSURIFY



Snejina Zacharia

CEO

"I saw that there was an opportunity to fill a major gap in the insurance space, and to redefine how people can search, compare, buy, and manage their insurance in one place."

What is your background and what led to you found Insurify in 2013?

My background is in operations strategy and intrapreneurship. I led teams across 22 countries with Gartner Research and started three new lines of business while at the company. At Gartner, I helped more than double EMEA operations strategy group revenue year over year and built the fastest growing business unit for the company.

I was finishing my MBA at MIT's Sloan School of Management when I started working on Insurify. I was involved in a minor car accident and I found that the insurance shopping was frustrating. I saw that there was an opportunity to fill a major gap in the insurance space, and to redefine how people can search, compare, buy, and manage their insurance in one place.

Our founding team has deep expertise from Kayak and TripAdvisor which has been instrumental for building the marketplace. We are redefining the way people buy and manage their insurance.



Exclusive CEO Interview – Snejina Zacharia

“Online insurance shopping has seen 300 percent growth over the last decade, but the insurance industry as a whole has still not adapted to the needs of the modern online consumer.”

Who does Insurify serve and what problems does it help them solve?

Out of the 260 million drivers in the USA, 46 million switch their car insurance on an annual basis for a variety of reasons. \$5 billion in commissions is generated annually from users switching policies alone.

Online insurance shopping has seen 300 percent growth over the last decade, but the insurance industry as a whole has still not adapted to the needs of the modern online consumer. A vast majority of shoppers are starting the car insurance journey online, but only 25 percent buy online. The reason behind that is poor user experience on carrier websites and getting trapped by lead generation sites.

Insurify is the most comprehensive online comparison platform for insurance shopping. Users get personalized recommendations and compare insurance quotes in real time based on price as well as discounts, reviews, features, and the overall carrier quality score. Users can buy insurance online, over the phone, or via Facebook Messenger, so there’s an element of consumer empowerment to the binding process. We’ve seen that 67 percent of our customers choose to buy online.

Our dynamic online insurance marketplace is a game changer for the industry. Through Insurify, insurers of many different sizes and risk appetites can compete online at scale. Put simply, Insurify solves the problems inherent in the modern insurance industry by providing value on the micro and macro levels.



Exclusive CEO Interview – Snejina Zacharia

“Insurify is the first virtual insurance agent/marketplace that leverages predictive analytics and natural language processing to simplify insurance price comparison and shopping.”

How does Insurify leverage artificial intelligence and natural language processing?

Insurify is the first virtual insurance agent/marketplace that leverages predictive analytics and natural language processing to simplify insurance price comparison and shopping. Insurify is also the first patented product of its kind that provides instant insurance quotes from photos of users' license plates.

Our RateRank™ algorithms connect customers with the best insurance companies for their needs and recommend the best coverage based on their profiles.

Our chatbot leverages NLP technology to respond to users' questions and to enable them to buy their insurance directly from Facebook.

We also run our marketing as a hedge fund powered with AI and NLP. Our proprietary auto bidding technology predicts the value of each click on the platform based on total quality score.

Insurify's solution model intrinsically promotes growth and expansion through self-perpetuating network effects with shoppers and insurers on either side. As the user base increases, our predictive models become more refined, and our product and marketing improve.



Exclusive CEO Interview – Snejina Zacharia

“Our insurance partners report that we are their highest converting partner and many of them refer to us as their key driver for new business growth.”

The lead gen space you operate in has generated mixed results for carriers. You’ve built Insurify on a different model of when and how you get compensated – explain how Insurify makes money and how that’s affected the way you operate the business?

We have direct API integrations to provide insurance quotes from all major carriers and we get paid agency commissions on closed policies.

Insurify is rapidly expanding its carrier and purchase options across the existing auto, home and life insurance comparison products. Our insurance partners report that we are their highest converting partner, and many of them refer to us as their key driver for new business growth. In addition, through advanced data modeling, we’re able to help insurers optimize their underwriting, customer experience and servicing.

Kayak is often referenced as an example of the kind of business and brand that could be built in insurance. What do you think is relevant for insurance from the Kayak experience and what doesn’t apply?

Insurify is building a platform which extends beyond the aggregator experience of Kayak or Trivago by providing a digital insurance advisor that can predict users’ needs and service them with data-driven recommendations.



Exclusive CEO Interview – Snejina Zacharia

“Some companies in the space simply show estimated quotes; we believe this constitutes a bad user experience, since estimated quotes are, in general, wildly different from real quotes.”

What has your experience been with the readiness of carriers to interact digitally with a partner like Insurify to quote and bind auto insurance? What percentage of shoppers are able to get a bindable quote with Insurify vs. an indicative quote that may change or be withdrawn when they transfer to a carrier’s site or live agents?

We have been overwhelmed by the interest from insurance companies to participate on the auto insurance comparison platform. In fact, we have a long list of integrations which are still in our pipeline! We work best with carriers that have available online bind capability on their site. About 90% of all of our quotes are bindable online through Insurify.

Some companies in the space simply show estimated quotes; we believe this constitutes a bad user experience, since estimated quotes are, in general, wildly different from real quotes.

The lead gen space also has a mixed reputation for the customer experience which in the worst case involves shoppers being bombarded with calls from multiple carriers and agencies. How does the Insurify customer experience compare?

Lead generation sites promise online insurance comparison, but only sell user data. As a result, shoppers receive unwanted phone calls from multiple random agents or carriers and are forced to repeat answers to the same questions.

By contrast, Insurify is customer-centric. Our users take two minutes to complete the online flow and compare insurance quotes from top-rated carriers in real time. They can buy policies online in less than five minutes.

Continued on next page



Exclusive CEO Interview – Snejina Zacharia

“Insurify covers 60 percent of the United States’ P&C market. Most of the industry’s largest carriers participate on the platform with real-time quoting.”

Continued from prior page

Our value for consumers is privacy. Our customers choose through Insurify how they want to be serviced: online, on the phone, or through chat. Providing great customer experience has been one of the key drivers of our success. We have a 9.8 out of 10 customer satisfaction rating, and word of mouth is actively growing.

How many auto insurance carriers’ products are you now able to quote, and what has your experience been with the largest insurers in the market who’ve generally been reluctant to support digital marketplaces?

Insurify covers 60 percent of the United States’ P&C market. Most of the industry’s largest carriers participate on the platform with real-time quoting. We have a couple of traditional captive agent carriers which do not quote on our platform yet but love our traffic! These carriers participate with fully integrated ads which helps us provide our users with the most comprehensive shopping experience.

You’ve accomplished a lot with relatively modest funding so far. What can you share about the growth of the business?

We have been growing, on average, 100 percent year over year since our launch. Our growth has been profitable on marketing spend for every year of our existence. We don’t like to lose money on marketing spend!

We’ve closed over \$80 million in policy premiums, and we’ve done that with only 11 full-time employees, 17 offshore developers, and \$6.6 million of funding.



Exclusive CEO Interview – Snejina Zacharia

“The recent advances in artificial intelligence and natural language processing will have a significant impact on insurance from underwriting, claims management, and policy administration in reinventing customer experience and new product development.”

What should we expect from Insurify going forward?

We want Insurify to be the destination platform for all types of insurance, and we want to have full control over the customer journey.

A big focus for us this year is expansion into home, renters, and life insurance.

Any final words of advice for other InsurTech entrepreneurs?

The insurance industry is ripe for disruption. The recent advances in artificial intelligence and natural language processing will have a significant impact on new product development and on reinventing the customer experience in underwriting, claims management, and policy administration.

Be focused. Find a real problem you need to solve and be laser-focused on execution. Be patient. Insurance is a slow industry and it is difficult to break in but not impossible. Build trust. Your reputation is everything - with your partners and your end consumers. Sales solve everything. Figure out customer acquisition early and don't waste too much money to learn. There is no value in building a great product if no one can find it.

Selected FT Partners InsurTech Research – *Click to View*



2018 InsurTech Interview Compilation



Lennar's \$70 million Co-Lead Investment in Hippo



Goji's Sale to Seeman Holtz



Next Insurance's \$83 million Series B Financing



LendingTree Acquires ValuePenguin or \$105 million



wefox Group Raises \$125 million in Series B Financing



Root Insurance Raises \$100 million in Financing



Cambridge Mobile Telematics Raises \$500 million in Financing

[VIEW MORE FT PARTNERS RESEARCH](#)

FT Partners Research – Annual InsurTech Almanac

2018 InsurTech Insights



Click pictures to view report

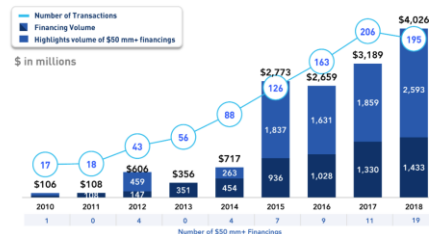
Highlights of the report include:

- 2018 and historical InsurTech financing and M&A volume and deal count statistics
- Largest InsurTech financings and M&A transactions in 2018
- Most active InsurTech investors
- Corporate VC activity and strategic investor participation
- Other industry, capital raising and M&A trends in InsurTech

2018 INSURTECH ALMANAC

InsurTech Financing Activity: Annually

InsurTech Private Company financing volume reached a record level in 2018, driven by a significant increase in financings of more than \$50 million



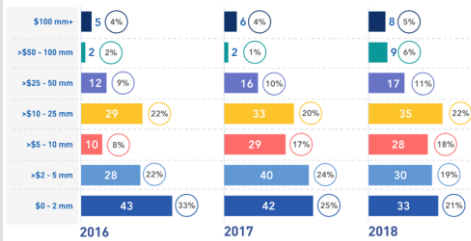
Source: FT Partners' Proprietary Transaction Database

FT PARTNERS RESEARCH

2018 INSURTECH ALMANAC

Number of InsurTech Financings by Round Size

The distribution of InsurTech financing amounts has been slowly shifting towards larger rounds as the sector has matured



Source: FT Partners' Proprietary Transaction Database

FT PARTNERS RESEARCH

ALLOCATION OF INSURTECH INVESTMENTS – P&C vs. L&H

Selected P&C Financings				Selected L&H Financings			
Target	Amount (\$ in mm)	Type		Target	Amount (\$ in mm)	Type	
BITSIGHT	\$40	Cyber Risk Rating Platform		COYA	\$30	Digital Insurer	
ROG	38	Vehicle Insurance Specialist		alan	28	Online Health Insurance	
CLARK	29	Digital Insurance Platform		bestow	23	Group Dental Insurance	
TRACTABLE	25	AI for Claims		bestow	15	Life Insurance	
simpleinsurance	24	Digital Insurance Solutions		ETHOS	15	Digital Insurance Platform	
CAPE	17	Property Intelligence Platform		ETHOS	12	Life Insurance	
atpay	13	Cyber Insurance Provider		hint	10	Care Administration Platform	
BriteCore	13	Software for Insurers		Ladder	10	Life Insurance	
kin	13	Digital Home Insurance Agency		Fabric	10	Life Insurance	
GOO	12	Digital Insurer		Selected Diversified Financings			
LessLock	10	Rent Payment Insurance		Target	Amount (\$ in mm)	Type	
BEIN	7	Insurance Technology Provider		policybazaar	\$238	Online Distribution	
				WorkFusion	50	Claims Automation	

Source: FT Partners' Proprietary Transaction Database

FT PARTNERS INSURTECH INSIGHTS

FT Partners – Focused Exclusively on FinTech

FT PARTNERS RESEARCH

Leading Advisor Across the InsurTech Landscape

Consumer Protection Plans

Financial Technology Partners LP
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is pleased to announce its role as exclusive strategic and financial advisor to

**square
trade**

in its sale to

Allstate

for total consideration of

\$ 1,400,000,000

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Telematics / Connected Car Solutions

Financial Technology Partners LP
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is pleased to announce its exclusive role as sole strategic and financial advisor to

AUTOMATIC

in its sale to

SiriusXM
SATELLITE RADIO

for total consideration of approximately

\$ 115,000,000

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Small Business Insurance

Financial Technology Partners LP
FTP Securities LLC

is pleased to announce its role as exclusive strategic and financial advisor to

**NEXT
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in its Series B financing led by

Redpoint

for total consideration of

\$ 83,000,000

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Homeowners Insurance

Financial Technology Partners LP
FTP Securities LLC

is pleased to announce its role as exclusive strategic and financial advisor to

LENNAR

in its minority investment in

Hippo

with participation from new and existing investors

for total consideration of

\$ 70,000,000

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Title Insurance

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is pleased to announce its role as exclusive strategic and financial advisor to

LENNAR

in its sale of

**NORTH AMERICAN
TITLE COMPANY** & **NATIC**
Like Clockwork®

to

states title

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Wholesale Brokerage

Financial Technology Partners LP
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**AmWINS
Group, Inc.**

in its growth recapitalization by

NMC

NEW MOUNTAIN CAPITAL LLC

valued at approximately

\$ 1,300,000,000

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Small Business Insurance

Financial Technology Partners LP
FTP Securities LLC

is pleased to announce its exclusive role as sole strategic and financial advisor to

insureon

in its equity capital raise led by

**OAK
HC/FT**

for total consideration of

\$ 31,000,000

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Auto Finance and Insurance Solutions

Financial Technology Partners LP
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SAFE-GUARD

on its sale to an Affiliate of

**Goldman
Sachs**

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Sales Automation Software

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**INSURANCE
TECHNOLOGIES**

in its sale to

MOELIS CAPITAL PARTNERS

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Agency Management / Marketing Technology

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FTP Securities LLC

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ZYWAVE

in its sale of

Zywave Insurance Solutions

to

**AURORA
CAPITAL GROUP**

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Personal Lines Insurance Distribution

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Goji

in its sale to

Seeman★Holtz
Property & Casualty

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P&C Claims

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enservio

in its sale to

Solera

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FT Partners Advises Lennar on its sale of NATC and NATIC

Overview of Transaction

- On December 6, 2018, Lennar Corporation (“Lennar”) announced its wholly-owned subsidiary North American Title Group (NATG) plans to combine its underwriter and the majority of its retail title business with States Title. The deal received regulatory approval and became effective on January 7th, 2019
 - States Title has acquired NATG’s underwriter, North American Title Insurance Company (NATIC), and a majority of the retail business of NATG’s national title agency, North American Title Company (NATC)
 - The newly combined company will continue to operate under the North American Title brand led by States Title CEO, Max Simkoff, and Lennar has assumed a substantial minority equity ownership stake
- NATC’s builder business and a portion of its retail business remains with Lennar and operates as CalAtlantic Title, while around two-thirds of NATG’s current associates have been transferred to States Title
- Lennar Corporation (NYSE:LEN) is one of the nation’s leading builders of quality homes
- States Title is a San Francisco-based title insurance and escrow platform that uses predictive analytics to streamline the underwriting, settlement, and closing processes of purchasing a home
- North American Title Group (NATG) is one of the largest real estate settlement service providers in the U.S.

Significance of Transaction

- The combination accelerates the growth of States Title and its vision, enabling the Company to better serve home buyers and sellers across the U.S. by leveraging its proprietary technology and analytics to create a modern real estate closing experience
- The transaction is consistent with Lennar’s strategy to align itself with leading technology innovators in order to streamline and enhance the overall customer experience

FT Partners’ Role

- FT Partners served as exclusive strategic and financial advisor to Lennar
- FT Partners also recently advised Lennar on its co-lead investment in home insurance innovator [Hippo’s \\$70 million financing round](#)
- This transaction underscores FT Partners’ deep FinTech expertise and its continued success in providing advisory services to world class organizations

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in its sale of



to



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FT Partners Advises Lennar on its Investment in Hippo

Overview of Transaction

- On November 14, 2018, Lennar Corporation (“Lennar”) announced it has co-led a \$70 million minority investment in Hippo with Felicis Ventures, along with participation from all major existing shareholders
 - The investment brings the total amount of funding raised by Hippo to \$109 million
- Lennar Corporation (NYSE:LEN) is the one of the leading homebuilders in the United States
- Headquartered in Mountain View, CA, Hippo is a leading property and casualty InsurTech start-up, offering homeowners insurance as well as a number of more specialized products
- Hippo has helped cut premium costs for its customers by up to 25%, seen policy sales grow by 30% month over month, and now covers more than \$25 billion in total property value
 - Hippo is accessible to more than 50% of the US homeowner population, and that number is expected to increase to over 60% by the end of 2018

Significance of Transaction

- With the new funding, Hippo will accelerate growth while continuing to deliver a modernized home insurance product that includes world-class customer experience on a national scale
- The transaction also offers a clear path for Lennar to continue to streamline the home buying experience for its customers

FT Partners’ Role

- FT Partners served as exclusive strategic and financial advisor to Lennar
- This transaction underscores FT Partners' deep FinTech expertise and its continued success in providing buy side advisory to top-tier strategic investors

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*is pleased to announce its role as
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LENNAR®

in its minority investment in



*with participation from
new and existing investors*

for total consideration of

\$70,000,000

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FT Partners Advises Goji on its Sale to Seeman Holtz

Overview of Transaction

- On November 13, 2018, Goji announced it has been acquired by Seeman Holtz Property & Casualty ("SHPC")
- Headquartered in Boston, MA, Goji operates an online analytics and data-driven distribution platform for personal lines of insurance that matches clients with the right coverage at the best prices, through an integrated network of national insurance carriers
 - Goji is a licensed insurance agency in 41 states that writes policies for clients on behalf of insurance carriers
- SHPC will integrate Goji's technology platform throughout its divisions and verticals to optimize operational efficiency, better address clients needs and increase production
- This acquisition marks SHPC's 50th acquisition

Significance of Transaction

- Through the acquisition, Goji's clients will gain access to the 400+ carrier relationships and the 50 state agent licenses of SHPC
- SHPC will continue to expand its access to more digital marketing channels and partnerships, further enhancing its online digital marketing and customer acquisition capabilities

FT Partners' Role

- FT Partners served as exclusive strategic and financial advisor to Goji
- FT Partners previously advised Goji on its [\\$15 million financing in November 2017](#)
- This transaction highlights FT Partners' strong expertise across the InsurTech landscape

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in its sale to

Seeman  Holtz
Property & Casualty

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FT Partners Advises Next Insurance on its Financing

Transaction Overview

- On July 11, 2018, Next Insurance announced an \$83 million Series B financing round led by Redpoint Ventures
 - Other investors that participated in the round include Nationwide, Munich Re, American Express Ventures, Ribbit Capital, TLV Partners, SGVC and Zeev Ventures
 - Elliot Geidt, Partner at Redpoint Ventures, will join the board of Next Insurance
- Founded in 2016 and headquartered in Palo Alto, CA, Next Insurance is the leading digital insurance company for small businesses
 - Next Insurance champions technological innovation and sophisticated uses of AI and machine learning to improve customer experience and streamline the insurance purchasing process
- In May 2018, Next announced its new status as a licensed insurance carrier, allowing the Company to write policies independently, as well as to have more freedom over underwriting, setting of prices, and configuring of policies

Significance of Transaction

- The funding will enable Next Insurance to continue its expansion throughout the US as a full service insurance carrier, further innovate claims handling, offer coverage to many more classes of business, and significantly grow internal operations in both the US and Israel
- The Series B round brings Next Insurance's total funding to \$131 million in just two years

FT Partners' Role

- FT Partners served as exclusive strategic and financial advisor to Next Insurance and its Board of Directors
- This transaction underscores FT Partners' successful track record generating highly favorable outcomes for leading InsurTech companies

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for total consideration of

\$83,000,000

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2018 Top Investment Bank in FinTech



Institutional Investor
Annual Ranking

2018 Steve McLaughlin Ranked #1 for the Second Year in a Row on Institutional Investor's FinTech 40 List

2017 Ranked #1 on Institutional Investor's FinTech 40 List

2015 & 2016 Ranked Top 5 on Institutional Investor's FinTech 35 List

2006 – 2008 Consecutively Ranked (2006, 2007 and 2008) among the Top Bankers on Institutional Investor's "Online Finance 40"



The Information

2016 Ranked #2 Top Technology Investment Banker on The Information's "Silicon Valley's Most Popular Dealmakers"



M&A Advisor
Awards

2018 Corporate / Strategic Deal of the Year

2018 Cross Border Deal of the Year

2017 Investment Banker of the Year

2016 Investment Banking Firm of the Year

2016 Cross Border Deal of the Year

2015 Dealmaker of the Year

2015 Technology Deal of the Year

2014 Equity Financing Deal of the Year

2014 Professional Services Deal of the Year, \$100 mm+

2012 Dealmaker of the Year

2012 Professional Services Deal of the Year, \$100 mm+

2011 Boutique Investment Bank of the Year

2011 Deal of the Decade

2010 Upper Middle Market Deal of the Year, \$500 mm+

2010 IT Services Deal of the Year, Below \$500 mm

2010 Cross-Border Deal of the Year, Below \$500 mm

2007 Dealmaker of the Year – Steve McLaughlin

2007 Business to Business Services Deal of the Year

2007 Computer & Information Tech Deal of the Year, \$100 mm+

2007 Financial Services Deal of the Year, \$100 mm+

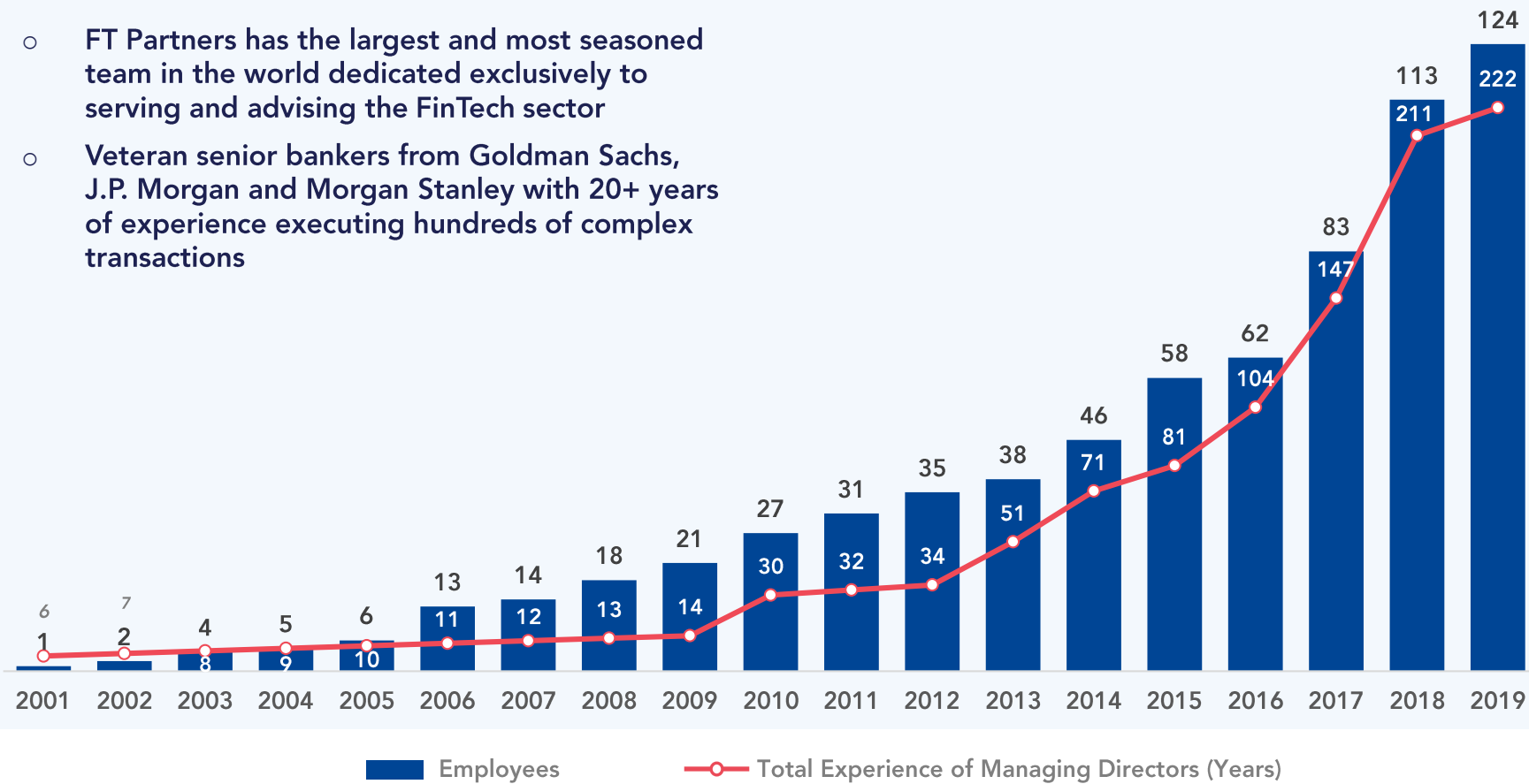
2004 Investment Bank of the Year

The FT Partners Senior Banker Team

Name / Position	Prior Background	Experience / Education	Years of Experience
Steve McLaughlin Founder, CEO and Managing Partner		<ul style="list-style-type: none"> Formerly with Goldman Sachs in New York and San Francisco from 1995-2002 Former Co-Head of Goldman Sachs' Financial Technology Group (#1 market share) Wharton M.B.A. 	24
Paul VanderMarck Managing Director		<ul style="list-style-type: none"> Formerly Chief Product Officer at Risk Management Solutions, a global technology business in the catastrophic risk space 25+ years of experience as an InsurTech operating executive Experienced advisor and investor in the InsurTech space 	27
Larry Furlong Managing Director		<ul style="list-style-type: none"> Formerly with Goldman Sachs in New York, London and Los Angeles from 1995-2004 Wharton M.B.A. 	23
Greg Smith Managing Director		<ul style="list-style-type: none"> Formerly award winning Equity Research Analyst at Merrill Lynch, J.P. Morgan and Hambrecht & Quist 20+ years of experience covering FinTech as both an Analyst and Investment Banker 	23
Osman Khan Managing Director		<ul style="list-style-type: none"> Formerly Managing Director and Head of FIG M&A at Alvarez & Marsal 15+ years FIG deal, consulting and assurance experience at PwC 40 Under 40 M&A Advisor Award Winner in 2013 LSE (BSc w/Honors), MBS (MBA w/Distinction), ICAEW (FCA) 	22
Steve Stout Managing Director		<ul style="list-style-type: none"> Formerly Global Head of Strategy at First Data Formerly Led J.P. Morgan Payments Investment Banking Practice Former Equity Research Analyst on #1 ranked team at UBS Former Economist at the Federal Reserve Bank 	21
Mike Nelson Managing Director		<ul style="list-style-type: none"> Formerly head of FinTech M&A at SunTrust Robinson Humphrey Kellogg M.B.A. 	19
Tim Wolfe Managing Director		<ul style="list-style-type: none"> Formerly with Goldman Sachs from 2000-2002 40 Under 40 M&A Advisor Award Winner 2013 Harvard M.B.A. 	17
Kate Crespo Managing Director		<ul style="list-style-type: none"> Formerly with Raymond James' Technology & Services investment banking 12+ years of FinTech transaction execution experience Dartmouth M.B.A. 	17
Timm Schipporeit Managing Director		<ul style="list-style-type: none"> Formerly with Morgan Stanley as Senior Executive Director of European Technology Investment Banking Team in London Formerly a Venture and Growth Investor focused on FinTech at Index Ventures 	16
Andrew McLaughlin Managing Director		<ul style="list-style-type: none"> 20+ years experience executing / implementing financial and operational strategy Formerly with Deloitte Consulting 	13

Platform of Choice for Clients and Bankers Alike

- FT Partners has the largest and most seasoned team in the world dedicated exclusively to serving and advising the FinTech sector
- Veteran senior bankers from Goldman Sachs, J.P. Morgan and Morgan Stanley with 20+ years of experience executing hundreds of complex transactions



Average Experience of Managing Directors (Years)

