

“Your business is unique—so your insurance should be too. I will tailor your policies and risk management program to match your precise needs.”

Dan Gilman, AAI, AFIS
Risk Advisor



Commercial Lines



Since 2010, Dan Gilman has leveraged his Cal Poly business degree and dynamic industry knowledge to ensure comprehensive coverage, quality products, financial soundness and excellent service.

CONSULTING

Whether you have a thriving business with a single storefront or a corporation spread over several states, Dan's approach will find the insurance solution to meet your specific needs.

- Analyze business exposure and audit current program in order to mitigate risk
- Present program comparative analysis and make recommendations based on business objectives
- Periodic review of market trends to ensure compliance with state and federal mandates
- Perform claim review: utilization, trends, and financial impact
- Advocate for clients by leveraging strong carrier relationships

ACCOUNT MANAGEMENT

From the marketing of your risk, to the placement of your coverage, to the exemplary servicing of your policies, we will earn and keep your company's trust. Dan will work closely with your Account Manager to ensure all of your programs are working for you.

- Coordinate meetings with carriers and associated internal resources
- Act as a resource for clients regarding coverage and billing
- Proactively review coverage and contracts
- Fulfill requests for proof of insurance
- Oversee renewal marketing process
- Identify changes in the operation of the business and update policies to minimize risk

MORRIS & GARRITANO

Insurance Services Since 1885