

InsuranceXdate.com – Benefits User Guide (v2)

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Toggle Data sets

Site Nav

Workers Comp

PipeLine Saved Tools States Subscribe Blog

Searches Groups Filter: x

Latest Flags Sub Activity Name Lookup: x Sort Flags

Reset Search

x nj capemay auto range 32 secs ago
 x 40.ch-1.21 3 mins ago
 x 1.JL-1.21 39 mins ago
 x 1.JL-12.3.20 41 mins ago
 x 39.SH-12.20-inc milage 6 days ago
 x 39.SH-12.20 6 days ago
 x 37.KM-11.5.20 1 week ago
 x 37.KM-12.20 2 weeks ago
 x mari cons 60-90 range 2 weeks ago
 x const burlington range 2 weeks ago

Schedule

January 2021 month week day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
	8a DUALAIRE 11a HY-POINT 11a TRI STAT	11a EXPRESS		9a DIAZ WHO		
3	4				8	9
	10a ARGUS S 12p CONTAIN 3p CUSTOM			CLEAR C a BERG		
10	11				15	16
	9a ANDERSO			HY-POI ALCIDO		
17	18	19	20	21	22	23
24	25	26	27	28	29	30


SHEPANSKIS LLC 03/18/2021 · 5 secs ago Contacted
 A CLEAR CHOICE PLUMBING & HEATING LLC 03/01/2021 · 3 mins ago spoke to Phil. said call Friday. Contacted
 BENNER PAINTING CO LLC 01/09/2022 · 20 hours ago Quoting
 A LUGAN CONTRACTORS INC 12/31/2020 · 21 hours ago premium doubled due to mod increase. Written
 TRADE MECHANICAL CONTRACTOR 12/31/2020 · 21 hours ago Written
 DIAZ WHOLESALE & MANUFACTURING CO., INC. DBA DIAZ FOODS 03/01/2021 · 4 days ago Quoting
 HY-POINT DAIRY INC 02/15/2021 · 6 days ago Quoting
 ADAMS-WARNOCK INC 01/01/2021 · 6 days ago Spoke to Melinda, loss runs are coming. Written
 CRESPEC INC 03/21/2021 · 6 days ago call after 2 Quoting
 PAULS POINTING INC 02/13/2022 · 1 week ago Quoting
 EAST COAST WAREHOUSE & FULFILLMENT INC 02/13/2022 · 1 week ago Quoting
 WILMINGTON BREW WORKS, LLC 01/25/2021 · 2 weeks ago Quoting

State: New Jersey
 County: All
 Effective Dates: Date Range
 Industry: All
 Class Code: All
 SIC Code: All
 Experience Mod: -
 Carrier Group: All
 Current Carrier: All
 PEO Provider: All
 Policy Filters: All

Saved Searches & Groups
 Latest Flags contains Prospects that you have flagged –
 -Saved
 -Contacted
 -Quoting
 -Written
 Search Menu
 Calendar contains scheduled activities –
 -Follow Ups
 -Appointments
 -'Call Next Year'

This is your home page while logged in to your account. Quick access to saved searches and groups, daily events and active opportunities, as well as the search menu.

Benefits - Search Menu

Reset  Search

State
Virginia

County Zipcode
All

Plan Features
All

Industry
All

Active Participants:
0 - ∞

Contract Type
All

Carrier
All

Renewal Date
Date Range

Premium
0 - ∞

Commission %
0 - 100

Loss %:
0 - ∞

Broker
Contains

Save Search

Plan Feature -
- Target by type(s) of Health Plan, or Retirement Plan Feature

Active Participants -
- Total within the org, not an individual coverage

Carrier -
- Target by provider

Premium -
- Total premium for all contracts in a plan

Loss Ratio -
- A calculated field available when plans are experience rated

Location -
- Toggle County/Zip Code Radius using the toggle link

Industry -
- 20 Industry Groups for targeting based on operations

Contract Type -

Renewal Date -
- Target by contract renewal date

Commission -
- Net commission for plan, inclusive of fees

Broker -
- Target by Brokerage

26-50 Of 1973 Results					
Name	Financials	Commissions	Renewal		
BMW OF STERLING 21710 AUTO WORLD CIRCLE STERLING, VA 20166	Premium: \$1,180,587 Liabilities: \$0 Net Assets: \$0	Commission: \$57,757 Comm % 4.89%	04-30-2020	⋮	
COUNTRY CHEVROLET 11 E LEE HWY WARRENTON, VA 20186	WELFARE BENEFIT PLAN Premium: \$5,813 Liabilities: \$0 Net Assets: \$0	Commission: \$74,156 Comm % 4%	04-30-2020	⋮	
UNITED MEDICAL LABORATORIES, INC. 1980 GALLOWES ROAD VIENNA, VA 22182	BENEFIT PLAN AND TRUST Premium: \$0 Liabilities: \$0 Net Assets: \$0		04-27-2020	⋮	
JEFFERSON SCIENCE ASSOCIATES, LLC 628 HOFSTADTER ROAD, SUITE 2 NEWPORT NEWS, VA 23606	125 BENEFIT PLAN Premium: \$0 Liabilities: \$0 Net Assets: \$0	Commission: \$0 Comm % NAN%	03-31-2020	⋮	
SEVATEC, INC. 2815 OLD LEE HIGHWAY FAIRFAX, VA 22031	WELFARE BENEFIT PLAN Premium: \$3,452,834 Liabilities: \$0 Net Assets: \$0	Commission: \$162,930 Comm % 4.72%	03-31-2020	⋮	
LANDMARK PROPERTY SERVICES, INC. PO BOX 18033 RICHMOND, VA 23226	EMPLOYEE BENEFITS PLAN Premium: \$385,545 Liabilities: \$0 Net Assets: \$0	Commission: \$41,110 Comm % 10.66%	03-31-2020	⋮	
SBG TECHNOLOGY SOLUTIONS 1737 KING STREET SUITE 601 ALEXANDRIA, VA 22314	EMPLOYEE BENEFITS PLAN Premium: \$629,497 Liabilities: \$0 Net Assets: \$0	Commission: \$46,429 Comm % 7.38%	03-31-2020	⋮	
CARAHSOFT TECHNOLOGY CORP 11493 SUNSEST HILLS ROAD SUITE 100 RESTON, VA 20190	EMPLOYEE BENEFITS PLAN Premium: \$1,891,554 Liabilities: \$0 Net Assets: \$0	Commission: \$88,798 Comm % 4.69%	03-31-2020	⋮	
BLUE RIDGE BEVERAGE COMPANY, INC. 44-46 BARLEY DRIVE SALEM, VA 24153	BEVERAGE GROUP HEALTH PLAN Premium: \$0 Liabilities: \$0 Net Assets: \$0	Commission: \$0 Comm % NAN%	03-31-2020	⋮	
FINK'S JEWELERS, INC. PO BOX 12906 FRANKFORD, VA 23862	GROUP EMPLOYEE BENEFIT PLANS Premium: \$70,962 Liabilities: \$0 Net Assets: \$0	Commission: \$875 Comm % 1.23%	03-31-2020	⋮	

Total Premium for All Benefit Plans

Total Broker Commission

Plan information is reported AFTER the plan terminates

This is different from WC, which is reported prior to the effective date

Export

10 Listing

List Export


Health Details

Company 
Links

Plan Navigation

Policies are separated by Carrier

 Google Maps

 Add'l Locations

Industry Info
Scroll down to view cross-reference data including SIC, NAICS, & GL codes

NAICS	424810	Beer and Ale Merchant Wholesalers
SIC	1542	Nonresidential Construction, Nec
GL Codes*	10141	Beverage Distributors-Nonalcoholic and Beer

Click on phone # to call (requires VOIP), and email to send an email

 Google search a phone#

Contact Info
Exports in the same order it appears on the site, so Upvoted contacts will appear first

COUNTRY CHEVROLET WELFARE BENEFIT PLAN >> G

Insurance | Participants | Features

COUNTRY CHEVROLET 11 E LEE HWY WARRENTON, VA 20186	DELTA DENTAL OF VIRGINIA Renewal: 2020-04-30 Covered: 213 1. Dental	Retention: \$ 20,499 Claims: \$ 56,840 Loss Ratio: 0.76	Exp Rated Premium: \$ 74,771 Non-Exp Rated Premium: \$ 0 Commission: 5.42% \$ 4,050 Fees: 0% \$ 0
Industry: Management of Companies and Enterprises FEIN: 540893728 Participants: 168 Total Premium: \$ 1,855,813 Ins. Commission: \$ 74,156 End Date: 04-30-2020	HARTFORD LIFE AND ACCIDENT Renewal: 2020-04-30 Covered: 168 1. Life Insurance 2. Temp. Disability Insurance 3. Long Term Disab. Ins 4. ACCIDENTAL DEATH AND DISMEMBERMENT, ACC	Retention: \$ 0 Claims: \$ 0 Loss Ratio: 0.76	Exp Rated Premium: \$ 0 Non-Exp Rated Premium: \$ 130,369 Commission: 21.54% \$ 28,087 Fees: 1.19% \$ 1,556
SIC Codes: 6719 NAICS: 551112	ANTHEM HEALTH PLANS OF VIRGINIA, INC. Renewal: 2020-04-30 Covered: 144	Retention: \$ 0 Claims: \$ 0 Loss Ratio: 0.76	Exp Rated Premium: \$ 0 Non-Exp Rated Premium: \$ 114,750 Commission: 0.04% \$ 2,340 Fees: 0% \$ 0

Contacts: **AUBREY FUNK** (Admin) (540) 347-9000

Notes: Add your first notes for this company!

- Save
- Contacted
- Followup
- Appt
- Quoting
- Written
- Nextyear
- Hide
- Remove

Group | Flag | Print | Prev | Next

Plan Totals

Add New Contact

Edit or Delete Contact

Voting

Appointments, Follow Ups & the 'Next Year' Flags schedule to the Calendar

All other Flags place account in your Latest Flags window on Pipeline

Add prospect to an existing Group by selecting, or create a new Group

- OSHA
- PA-issues
- pipeburst
- Review
- Review-TN
- Review-TX
- Roofers Assn
- Sean
- Weber
- Add New Group

Print Out

List Scrolling

Access Broker info here

Notes include date and user name that entered note.

Retirement Search Results/List View

26-50 Of 10000 Results

<< < 1 2 3 4 > >>

Name ▼		Financials ▼	Commissions ▼	Renewal ▼	
MARYLAND FARM BUREAU, INC. 3358 DAVIDSONVILLE ROAD DAVIDSONVILLE, MD 21035	401K PROFIT SHARING PLAN	Assets: \$1,735,851 Liabilities: \$0 Net Assets: \$1,735,851	Commission: \$2,376 Comm % 0.14%	06-30-2020	⋮
THE GREATER BALTIMORE BOARD OF REALTORS, INC. 1954 GREENSPRING DRIVE SUITE 100 TIMONIUM, MD 21093	401(K)/PROFIT SHARING	Assets: \$573,074 Liabilities: \$0 Net Assets: \$573,074	Commission: \$0 Comm % 0%	06-30-2020	⋮
CASPER G. SIPPEL, INC. 7408 BELAIR ROAD BALTIMORE, MD 21236	PROFIT SHARING PLAN	Assets: \$4,582,888 Liabilities: \$0 Net Assets: \$4,582,888	Commission: \$44,676 Comm % 0.97%	06-30-2020	⋮
COMMISSIONED OFFICERS ASSOCIATION OF US PUBLIC HEALTH SERVICE 8201 CORPORATE DR SUITE 1170 LANDOVER, MD 20785	401(K) RETIREMENT SAVINGS PLAN	Assets: \$861,952 Liabilities: \$0 Net Assets: \$861,952	Commission: \$300 Comm % 0.03%	06-30-2020	⋮
THE HEARING AND SPEECH AGENCY OF METROPOLITAN BALTIMORE, INC. 5900 METRO DR BALTIMORE, MD 21215	403(B) THRIFT PLAN OF	Assets: \$3,550,486 Liabilities: \$0 Net Assets: \$3,550,486	Commission: \$0 Comm % 0%	06-30-2020	⋮
MONTGOMERY COUNTY EDUCATION ASSOCIATION 12 TAFT COURT, SUITE 200 ROCKVILLE, MD 20850	RETIREMENT PLAN	Assets: \$3,650,202 Liabilities: \$0 Net Assets: \$3,650,202	Commission: \$633 Comm % 0.02%	06-30-2020	⋮
MARYLAND METALS, INC. 304 WEST CHURCH STREET HAGERSTOWN, MD 21741	401(K) PLAN	Assets: \$197,851 Liabilities: \$0 Net Assets: \$197,851	Commission: \$1,380 Comm % 0.7%	06-30-2020	⋮
HENRY M. MURRAY AGENCY, INC. 2498 RIVA ROAD ANNAPOLIS, MD 21401	401(K) PROFIT SHARING PLAN	Assets: \$0 Liabilities: \$0 Net Assets: \$0	Commission: \$2,717 Comm % 0%	06-30-2020	⋮
MONTESSORI SOCIETY OF CENTRAL MARYLAND, INC. 10807 TONY DRIVE LUTHERVILLE, MD 21093	RETIREMENT PLAN	Assets: \$2,793,850 Liabilities: \$0 Net Assets: \$2,793,850	Commission: \$0 Comm % 0%	06-30-2020	⋮
HILLENDALE PRESS, INC. 312 CENTRE AVENUE BALTIMORE, MD 21202	SHARING PLAN & TRUST	Assets: \$642,953 Liabilities: \$0 Net Assets: \$642,953	Commission: \$5,812 Comm % 0.9%	06-30-2020	⋮

Export
10 Listing ▼

List Export

Retirement Details

Company Links

A. L. GILBERT COMPANY PROFIT SHARING & RETIREMENT PLAN >>
Financials **Providers** Participants Features

	2019	2018	2017	2016	2015	2014	2013	2012	2011
BOY Assets:	\$ 29,590,121	\$ 26,220,536	\$ 23,273,711	\$ 25,834,679	\$ 25,320,545	\$ 22,500,301	\$ 21,172,416	\$ 21,024,374	\$ 19,546,297
Liabilities:	\$ 136,519	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 400	\$ 0
EE Contrib:	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 450,000	\$ 0	\$ 0
Emp Contrib:	\$ 400,000	\$ 400,000							
Income/Loss:	(\$ 1,413,429)	\$ 2,626,000							
Total Income:	\$ 664,579	\$ 4,410,000							
Paid Benefits:	\$ 1,661,065	\$ 1,038,000							
Expenses:	\$ 0								
Commission:	\$ 8,342	\$ 2,000							

A.L. GILBERT COMPANY
304 NORTH YOSEMITE AVENUE
OAKDALE, CA 95361

FEIN: 942277358

Participants: 352

Assets: \$ 28,585,293

Commission: \$ 8,342

End Date: 02-28-2019

Accountants: **ATHERTON & ASSOCIATES**
941239084

NAICS: 424500

MATRIX FINANCIAL SOLUTIONS, INC.	Custodial (other than securities) Trustee (bank, trust company or similar financial institution) Trustee (directed) Investment management Direct payment from the plan Shareholder servicing fees Float revenue	Compensation: \$5,842 Relation: NONE
DIGITAL RETIREMENT SOLUTIONS, INC.	Claims processing Recordkeeping and information management (computing, tabulating, data processing, etc.) Participant loan processing Participant communication Direct payment from the plan Sub-transfer agency fees Recordkeeping fees	Compensation: \$2,500 Relation: NONE

Contacts

MICHAEL SCHONHOFF
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Controller
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✉️ michael.schonhoff@farmerswarehouse.com

MICHAEL SCHONHOFF
Controller
📞 (209) 847-1721
✉️ mschonhoff@jlgilbert.com

Notes

Make a note...

Add your first notes for this company!

Auto-Dial
Group
Flag
Print
Prev
Next

Plan Summary

Accountant Info

Add New Contact

Edit or Delete Contact

Voting

Provider info includes roles & compensation

Click on phone # to call
(requires VOIP), and email to send an email

Google search a phone#

Contact Info
Exports in the same order it appears on the site, so Upvoted contacts will