

CUSTOMER Profile:



PATRIOT

RISK & INSURANCE SERVICES

Although the economy continues to batter most commercial businesses, Len Ziminsky and Dave Jacobson, the founders of Patriot Risk & Insurance Services in Irvine, have seen their insurance agency become perhaps the fastest growing in Southern California since opening their doors not quite two years ago. During that period of time they have grown from eight to nearly twenty-five employees. The secret

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to their success is the risk management services they provide to their clients which go well beyond the selling of insurance.

By providing in-depth professional insurance and safety and loss control services, aggressive workers’ compensation and liability claims handling, and contract reviews in addition to representing dozens of quality insurance companies, Patriot

is seen as an important trusted advisor and partner to their clients. The results of their risk management services allow their clients to obtain broad insurance coverages at the most competitive premiums.

Len, who earlier in his career had held risk management positions with Fortune 100 and other well-known organizations explained, “Large companies generally have a Risk Management Department whose primary responsibility is to cost-effectively protect the assets of their employer. Small to medium sized firms share the same concerns and recognize that insurance is a major budget item. While these firms don’t need a full-time risk manager they are still seeking ways to reduce their costs while maintaining a professionally designed insurance program. This is where we step in. We help our clients better understand their insurance coverages so we can design their policies around their needs while also working closely with them to reduce the likelihood of a claim occurring in the future. If a claim does occur we very aggressively work with our clients and the insurance companies to assure the best possible outcome.”

Patriot’s clients come from many industries including construction, manufacturing,

property management/development, education and technology. In addition, some of their tailor-made insurance programs have been endorsed by industry associations in several states.

Both Len and Dave are very grateful that they were referred to Partners Bank prior to their opening. They both agree, “Not only did they take the time to understand our business and approve a credit-line for us; their customer service can only be described as ‘Excellent’. The response time from Mike and his team in most cases is within minutes. The remote deposit system made available to us has also worked extremely well. As we plan for the growth and expansion of our business it’s good to know that we have a banking partner.”

If you have any commercial or personal insurance questions or needs, please call Len or Dave at Patriot Risk & Insurance Services at 949.486.7900. And if you know of anyone looking for a banking partner, contact Partners Bank of California today at 949.732.4000.

