Summary of Employment and Experience History
Daniel P. Menzer, CPA

Starting his career in 1980 at Peat, Marwick, Mitchell & Co., predecessor of KPMG, Mr. Menzer earned his CPA credential and soon after completed his MBA from the University of Connecticut. As a Senior Auditor at KPMG, Mr. Menzer developed a specialization in the insurance industry, and in 1983 accepted a position at the Hartford Insurance Group in Hartford, Connecticut.

After spending several years in the financial reporting and later as Controller of an insurance agency subsidiary of The Hartford, Mr. Menzer accepted the position of Controller and Business Analyst at Lawrence Group, Inc., a Business Insurance top-20 insurance broker in Albany, N.Y in 1988. Mr. Menzer was responsible for financial reporting and analysis, as well as budgets, financial controls and accounting practices. He also played a key role in the analysis, structure, due diligence and financial integration of several insurance agency acquisitions in three states.

In 1995, Mr. Menzer joined Marsh, Berry & Co., an insurance industry financial consulting firm based in Ohio, performing fair market valuations, ownership perpetuation analysis, and merger representation of insurance agencies. In late 1996, he joined Arthur J. Gallagher & Co., the world's fourth-largest insurance brokerage.

At Gallagher, Mr. Menzer worked as a unit controller and later became Vice President of Finance in the consolidation of the brokerage's Chicago operations. He also worked as a Regional Controller and Chief Financial Officer within the Brokerage Services Division, helping design and implement the firm's Sarbanes-Oxley financial controls while making contributions to the division's financial and strategic planning efforts.

Bringing with him more than 25 years of insurance experience, Mr. Menzer joined **OPTIS** Partners in 2008 where he specializes in financial management, perpetuation planning, merger representation and facilitation, compensation design and review, and fair market valuations.