



# LegalShield®

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## Backgrounder

### **Company History and Reach**

In 1969, the founder, Harland Stonecipher, had an epiphany. He found himself financially unprepared for the legal costs he incurred from a car accident, even though it wasn't his fault. From that day forward, he was determined to make sure everyone had affordable access to legal care—no matter how traumatic or trivial the situation. Thus, LegalShield was born. Life can be unpredictable, and legal issues can be complicated and costly. LegalShield created a model for legal coverage in which you know exactly what you're getting and precisely how much you're paying for it. LegalShield has become one of North America's leading providers of legal plans and identity theft protection and restoration for individuals, families and small businesses. Today, the company is owned and backed by Stone Point Capital, a private equity firm.

LegalShield's 1.75 million memberships are protecting and empowering 4.375 million lives and serving 140,000 businesses. The company's category-leading product IDShield provides identity monitoring and restoration services to more than one million individuals in 50 states and 4 Canadian provinces. Currently, 34,000 companies offer LegalShield and IDShield plans to their employees as a voluntary benefit.

LegalShield has a network of dedicated law firms in 50 states and 4 Canadian provinces. Our 39 provider law firms provide legal protection to more than 1.75 million families any time they need it, even in covered emergency situations, 24/7, 365 days a year. With one phone call, LegalShield Members gain access to a lawyer who will provide consultation, review documents, make calls, send emails, and write letters and in some cases handle trial defense. LegalShield lawyers have an average of 22 years' experience in areas such as family matters, estate planning, financial and business issues, consumer protection, tax, real estate, benefits disputes and auto/driving issues. Members can call LegalShield's dedicated law firms for help without having to worry about high hourly rates.

### **Identity Protection**

Through its IDShield product, the company also provides its members with identity theft plans that help members reduce the likelihood of identity theft and, importantly and unlike other plans, resolve problems arising from identity theft. IDShield covers approximately one million people, providing security and privacy monitoring, along with consultation and restoration services by a team of dedicated licensed private investigators. If a member becomes a victim of identity theft, IDShield, backed with an unlimited service guarantee will do whatever it takes for as long as it takes to restore their identity. IDShield Members have access to a credit score, continuous monitoring with activity alerts, password manager, consultation and comprehensive identity restoration by a dedicated licensed private investigator.

## **For Entrepreneurs**

Launch is the newest product in the LegalShield portfolio. Its industry-leading DIY technology helps people starting a business to structure their enterprise, and includes incorporation, LLC and DBA services. Launch also comes with LegalShield's Family Legal Plan and Home Business Supplement. It helps members start a business with easy to follow online steps with a lawyer's advice all through an app. Compared to the competition, Launch provides considerably more value for a lower price: an easier process for starting a business, legal advice during the process and additional legal support services after launching.

## **Innovative Technology**

LegalShield has invested in developing best-in-class technology-based products and services, making access to information, legal advice and representation easy for members. The mobile apps enable LegalShield Members to monitor their identity; create, sign and send legally binding agreements; communicate with their attorney; and share files and discovery documents in mere seconds. Members have direct access to their law firm, and the game-changer is, the firm and its lawyers are accountable to them. To ensure member satisfaction and quality, LegalShield surveys every contact and case. Members have the power (and responsibility to the community) to rate their experience after every interaction, resulting in a Net Promoter Score (NPS). The NPS for LegalShield is 56, putting the network on par with companies like Samsung, TurboTax and Apple iPad/iPhone.

## **Company Leadership**

The company is led by its Chief Executive Officer, Jeff Bell. Its management team is comprised of Kathy Pinson, EVP, Chief Operating Officer; Allen Madden, SVP, Chief People Officer; Steve Williamson, EVP, Chief Financial Officer; Darnell Self, EVP, Network & Business Development; Keri C. Norris, SVP, Legal & Regulatory Affairs and General Counsel; Jack Goldenberg, EVP, Chief Technology Officer; David Coffey, SVP, Chief Digital Officer; Scott Grissom, SVP, Chief Product Officer; John Long, President Network Marketing & Sales; and Glenn Petersen, President of LegalShield Business Solutions.

Its board of directors includes: Fayez S. Muhtadie, Principal, Stone Point Capital; Andrew R. Reutter, Principal, Stone Point Capital; Jarryd B. Levine, Principal, Stone Point Capital; Ted Virtue, Chief Executive Officer at MidOcean Partners; Frank Schiff, MidOcean Partners Managing Director; John Addison, Non-executive Chairman of Primerica Distribution; Peter Jarvis, Vice President of TidalScale; and Jeff Bell, CEO of LegalShield.

The company has more than 700 employees in five offices, including more than 100 information technology personnel and 350 call center personnel.