



**Contact:**

Jennifer Gaglione  
JenniferGaglione@LegalShieldCorp.com  
216-870-6333

## 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 service in which members know exactly what they're getting and the precise cost for service. LegalShield has become one of North America's leading providers of legal plans and online privacy and reputation management for individuals, families and small businesses. Today, the company is owned and backed by Stone Point Capital, a private equity firm.

LegalShield's 1.8 million memberships protect and empower approximately 2.6 million lives and serve 140,000 businesses. The company's category-leading product IDShield provides online privacy and reputation management services to more than one million individuals in 50 states, all Canadian provinces, and in the United Kingdom. Currently, 34,000 companies offer LegalShield and IDShield plans to their employees as voluntary benefits.

### **LegalShield**

LegalShield has a network of dedicated law firms spanning the United States and Canada. 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. LegalShield provider 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 provider law firms for help without having to worry about high hourly rates.

LegalShield Plans for Individuals and Families: Enables members to quickly and directly access a wide range of personal legal services and consultation on an unlimited number of personal legal matters from qualified, experienced attorneys. 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. Such services typically cost hundreds of dollars per hour;

however, the plan model lowers member costs to a nominal monthly fee, potentially saving members thousands each year.

- **LegalShield Plans for Businesses:** *The LegalShield Small Business Plan* meets a wide range of business legal needs including contract and document review, debt collection, letters and calls, and trial defense. Business owners have direct access to provider attorneys. Our 2nd plan, *LegalShield Launch* helps businesses structure their enterprise, and includes incorporation, LLC and DBA services, using industry-leading DIY technology. *Launch* also comes with 3 months of LegalShield's Family Legal Plan and Home Business Supplement.

## **IDShield**

IDShield privacy and reputation management consultation and services help approximately 1 million members. It provides access for assistance with personal data breaches and identity theft. Members have access to their credit scores, continuous monitoring of their Personally Identifiable Information (PII), and activity alerts. Identity restorations are handled dedicated Licensed Private Investigators. If a member becomes a victim of identity theft, IDShield, backed by an unlimited service guarantee, will work with the member for as long as it takes to achieve full restoration. The plan also provides an identity fraud protection plan of up to \$1 million.

## **Innovative Technology**

The company's investment in developing best-in-class technology-based products and services has given members easy access to sound legal advice and representation, and privacy and reputation management.

- **The LegalShield Mobile App** enables members to 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. 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's Provider Attorney Network is 58, as compared to the average NPS score of 29 for the legal industry.

- **The IDShield Mobile App** alerts members to identity threats and credit inquires, shows their credit score, and provides direct, 24/7 emergency access for an identity fraud emergency. Members can also track and edit their monitored information via the mobile app. The NPS for IDShield Identity Protection Consultation Services is 70; the NPS for Identity Restoration is 75.

## **Company Leadership**

The company is led by its Chief Executive Officer, Jeff Bell. The executive management team includes Kathy Pinson, EVP, Chief Operating Officer; Scott Grissom, Chief Financial Officer; Darnell Self, EVP, Network & Business Development; Keri C. Norris, EVP, Chief Legal Officer; Arnold Blinn, Chief Technology Officer; Don Thompson, President, Network Marketing & Sales; Martine Giroto, President of LegalShield Canada; Todd Barrs, President, Direct to Consumer Division; Cameron Scott, Chief Marketing Officer; and Glenn Petersen, President of LegalShield Business Solutions.

Its board of directors includes Fayez S. Muhtadie, Principal, Stone Point Capital; Oliver Sarkozy, Founder, and Managing Partner, Further Global; Frank Schiff, MidOcean Partners Managing Director; John Addison, Non-executive Chairman of Primerica Distribution; Nik Dixit, Vice President, Stone Point Capital; Melvin Hall, Shareholder Partner of Riggs, Abney, Neal, Turpen, Orbison & Lewis; Deborah McWhinney; and Jeff Bell, CEO of LegalShield.

The company has more than 700 employees in the United States and Canada, including more than 100 information technology personnel and 350 call center personnel.

LegalShield provides access to legal services offered by a network of provider law firms to LegalShield members through membership based participation. Neither LegalShield nor its officers, employees, or sales associates directly or indirectly provide legal services, representation, or advice. See a legal plan contract for a specific state, province, or territory of residence for complete terms, coverage, amounts, and conditions. IDShield is a product of Pre-Paid Legal Services, Inc. d/b/a LegalShield ("LegalShield"). LegalShield provides access to identity fraud protection and restoration services. For complete terms, coverage, and conditions, please see an identity theft plan. All Licensed Private Investigators are licensed in the state of Oklahoma. An Identity Fraud Protection Plan ("Plan") is issued through a nationally recognized carrier. LegalShield/IDShield is not an insurance carrier. This covers certain identity fraud expenses and legal costs as a result of a covered identity fraud event, with the amount dependent on the type of identity theft plan. See a Plan for complete terms, coverage, conditions, and limitations related to family members who are eligible under the Plan.

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