

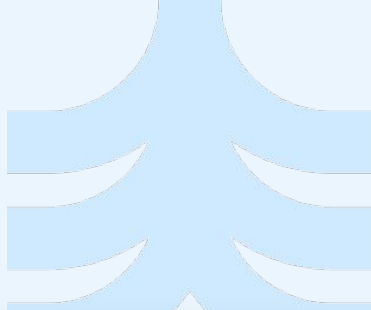
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Voice of the Insurance Broker

Digital FY25



Forward Looking Statements



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This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, results or outcomes could differ materially from those expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: our ability to meet the expectations of our customers; uncertainties regarding AI technologies and its integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including related to AI and Agentforce; our ability to execute our business plans; the pace of change and innovation in enterprise cloud computing services; and our ability to maintain and enhance our brands.

Rate Insurance Fireside Chat





Dominic Tassi
SVP
Rate Insurance



Chris Cicchetti
Industry Marketing
Salesforce

best-in-class tools for agents and quality insurance products to enhance client satisfaction.

Rate Insurance, LLC is a national award-winning fintech focused agency, ranked among the top 50 personal lines agencies and the top 100 P&C agencies in the U.S. We offer personal, commercial, specialty & life insurance products.

Our team of agents are licensed in all 50 states and work locally bringing deep knowledge and expertise of local markets to provide tailored insurance solutions.

Our mission is to deliver an exceptional insurance experience and customized options to meet the diverse needs of our customers and referral partners.



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2nd largest retail mortgage lender in the U.S. and
Best Mortgage Lender for First Time Homebuyers.

Rate Insurance is one of the fastest organically growing national insurance brokerages in the country. \$183M YE premium placed; 30% growth rate; 40% of business originated outside of mortgage

50

**licensed in all
50 states
& Puerto Rico**

100+

top-rated
insurance carrier
partners

87k+

policies serviced
nationally

4.97

Google Review
rating

200

licensed agents
aligned by region &
virtually connected

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Thank you

