



## Our Company

*Proud Member of the:*



Bruce A. Hollett & Associates  
#401-1630 Pandosy Street  
Kelowna, BC V1Y 1P7

P: 250-861-1006

F: 250-861-6177

TF: 1-866-861-1006

E: [bhollett@telus.net](mailto:bhollett@telus.net)

[www.insuranceontheweb.ca](http://www.insuranceontheweb.ca)



## *Our Services To You*



The following are a few of the consulting services offered by Bruce A. Hollett & Associates:

### **Program Design**

- ✓ Design new benefit plans and revise existing benefit plans to meet the specific needs of our clients.

### **Plan Installation**

- ✓ Assist with employee enrollments and provide support to your plan administrator.

### **Communications**

- ✓ We offer a quarterly newsletter called Beneficial Ideas, which provides helpful hints and advises of government changes that may affect your plan.
- ✓ Websites available for employees to obtain additional information on personal products. [www.insuranceontheweb.ca](http://www.insuranceontheweb.ca)
- ✓ Our staff is available to assist employees with additional insurance issues.

***Our success in the future will be based on our ability to ensure that you receive the best advice and service possible.***





## *Who We Are*



Since 1978 Bruce A. Hollett & Associates has been an Employee Benefits Consulting firm. In 1984 Bruce moved his practice to Kelowna, BC and has been offering Group Benefits to any size business. Our clients know our goal is to provide the very best service and advice on their benefits program.

Our organization has these superior advantages:

**1) We represent all insurance companies including Exclusive Marketing Rights with 3 Third Party Administrators (TPA).**

TPA's allow you to purchase your Group Benefit Plan at Wholesale rates. The TPA providers we use have unique solutions for the hourly construction worker, & flex benefit designs for any size business. You pay no additional administration fees for the services of our TPA's.

**2) We offer Flex plan designs for any size business.**

**3) Personal Care for You and Your Employees.**

To save you time and money, we will be the first point of contact for your administrator and employees between the Insurance Company and/or TPA. Our philosophy has always been work time should not be used to deal with claim issues. We ensure your group benefit plan works for you!

**4) We ensure you receive the highest Return on Investment (ROI) for your premium dollars spent.**

**5) We work with an Individual & Estate Specialist to ensure you are covered from simple term products to complex corporate structured programs.**

Some of the products and services are:

- Critical Illness
- Disability
- Life Insurance
- Universal Life
- Whole Life
- Individual Pension Plans
- RRSP's

***Let Dean show you how to take advantage of your untapped resources within your corporation!***





## *Our Team*



### **Group Benefits Team**

#### **Bruce Hollett – Group Sales**

Bruce Hollett was born and raised in Newfoundland before moving to Edmonton in June of 1975. Bruce started his career in the insurance industry in June 1978, opening Bruce A. Hollett & Associates in 1979. In 1984 he moved his practice to Kelowna, BC. Bruce A. Hollett & Associates is a long time member of the Better Business Bureau and the Canadian Federation of Independent Business (CFIB). Bruce volunteers his time as Vice President and board member of the Kelowna Share Society, and is a member of the Horse Rescue Society. He has dedicated a lot of his time with other non-profit organizations and was presented a Certificate of Merit by the Federal Government for his community involvement.

#### **Sandy – Group Administration**

Sandy moved to Kelowna in 2000 from Swift Current, Saskatchewan where she was Administration Supervisor for a major accounting firm for 23 years. In 2004 Sandy became a licensed assistant for Bruce Hollett, with her main priority being client service and administration.

#### **Samantha – Marketing Manager**

Sam has been working in the group benefits industry since 2007. She brings with her extensive computer knowledge, social media skills, and a creative flare. Sam is working on updating our website, blog, newsletters and assisting with sales.

### **Individual & Estate Planning Team**

#### **Dean – Individual & Estate Planning Sales**

Dean Falkenberg has worked in the insurance industry for the last 16 years throughout BC & Alberta. Dean's firm works with a variety of products from simple term life, to more complex corporate programs. To ensure clients are getting the most out of their insurance products Dean works closely with tax specialists, lawyers, and certified accountants. Dean's company helps out in the community by sponsoring underprivileged children to ensure they can join a sports or swim class. Dean believes strongly in donating regularly to charities that help feed struggling families.

In his spare time Dean enjoys distance running and spending time with his 5 children & 4 grandchildren.

