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I N C O R P O R A T E D

**James J. Barnes Insurance Services Purchased By  
Sitzmann Morris & Lavis, Inc.  
Barnes' Clients To Access Proprietary  
SML Benefit Center**

Santa Rosa, Calif. – September 1, 2004 – Sitzmann Morris & Lavis (SML), one of the leading independent based insurance advisory firms in Northern California has completed the purchase of James J. Barnes Insurance Services (JBIS) of Santa Rosa California. Jim Barnes has remained partnered with SML and will continue to be actively involved with all his clients.

“Jim Barnes is one of the truly successful insurance executives in the business,” said Gary Sitzmann, Chairman and CEO. “He has been a leader in our industry and tremendous advocate for his clients since 1977. We are thrilled to have him and his clients join our team. We feel the partnership will carry on a long tradition of outstanding client relations and service.”

James J. Barnes Insurance Services will operate under the Sitzmann Morris & Lavis name. The acquisition gives JBIS clients access to SML proprietary insurance products and sophisticated administrative services including the SML Benefit Center. This Web-based information resource site provides a secure, central location where human resource personnel and employees can access comprehensive benefit and proprietary wellness information online. The lasting result is less corporate overhead, reduced healthcare costs and more productive employees.

The SML Benefit Center was created as a resource for all companies to help them better manage and improve their employee benefit programs without adding overhead or infrastructure. Employers gain access to a host of proprietary administrative tools that help them better organize and distribute benefit information while staying in compliance with laws at the workplace. Employees, on the other hand, can utilize important and sometimes life saving wellness tools that contribute to a healthier employee and more industrious working environment.

"The SML Benefit Center is one way companies can make life easier for its overworked HR departments and provide a real benefit for its employees," says Bill Lavis, partner at Sitzmann Morris & Lavis. "The Center for Disease Control recently reported that obesity is the number two cause of death in the U.S. after smoking, blaming poor diet and inactivity as contributing factors. These are preventable conditions that are driving up healthcare costs. People have the choice to change their behavior. The SML Benefit Center helps employees manage their

benefits, take responsibility for their health and enables companies to promote a healthier workplace. Jim Barnes' clients will benefit a great deal from these services."

### ***SML Benefit Center at a Glance***

HR Managers can take advantage of the following services:

- **SML LawRoom** — premier online legal reference center that helps employers keep their corporate workplace in compliance.
- **SML Employee Benefits Resource Guide** – proprietary reference guide that provides the latest information about benefit related news, legislation and tips to stay in compliance.
- **SML Benefit Administration Center** — provides proprietary online access to comprehensive benefit summaries, important carrier forms, detailed provider information and much more. Carefully designed to help address the specific benefit needs of both the employees and human resource departments.

Employees can help manage their wellness and activity level with services including:

- **SML Wellness Center** — proprietary online health and wellness resource center providing comprehensive information pertaining to nutrition, fitness, lifestyle, training routines and medical resources routines.
- **SML Personal Advantage** – leading online Employee Assistance Plan designed and developed to provide employees with a full spectrum of behavioral healthcare solutions and resources.
- **SML WorkFit Tips** — proprietary monthly, one page newsletter that recommends ways of maintaining fitness in the workplace.

For more information about the JBIS Acquisition or SML Benefit Center please contact us at [info@smlinsurance.com](mailto:info@smlinsurance.com) or call 1-800-733-3131.

### **About Sitzmann Morris & Lavis**

Founded in 1965, Sitzmann Morris & Lavis, Inc. (SML) is a leading independent based, California insurance advisory firms headquartered in Oakland. The firm is an established leader in the employee benefits, life insurance, estate planning and business continuity fields. Their access to proprietary insurance products and sophisticated administrative services are virtually unmatched nationwide. SML currently works with more than 700 group insurance clients and over 3,000 individual life insurance clients with total coverage in excess of two billion dollars. For more information, please visit [www.smlinsurance.com](http://www.smlinsurance.com) or contact Kimberly Bell at [kbell@smlinsurance.com](mailto:kbell@smlinsurance.com) or 1-800-733-3131 .