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PROFESSIONAL OVERVIEW

A proven professional with a documented career track of executive leadership and performance success, bringing significant C-level leadership acumen along with the drive and enthusiasm needed in advancing an enterprise's mission. Professional experience follows a solid track record of outstanding growth and profitability results in a variety of leadership roles in the business services sector with a blend of companies from Fortune 50 to significant entrepreneurial settings. A highly adaptable resilient stress-tested leader, who utilizes existing resources, creates value and is a positive and stimulating leader.

- P&L management from start-up to ~ \$1B.
- Extensive M&A experience through acquiring / merging / liquidating well over 100 different companies.
- Unique blend of C-level experience with complementary business services firms.

PROFESSIONAL EXPERIENCE

Springtree Group

Springtree Group is a private consulting organization focused in the insurance space. STG is a specialized firm with a high level of M&A, organizational integration, operations and financial management expertise. Have operated Springtree Group to greater or lesser degrees concurrent with other roles over the past 25 years.

CEO / Founder – Dallas, Texas 1988 - Present

Serve as the practice leader providing guidance and expertise in the completion of projects achieving verified success with financing, integrations, turnarounds, brand building, organizational reengineering, and resolving management hot spots.

- Successfully market and provide Springtree Group services to companies in the insurance services space. Developed and maintain strategic partnerships with top third party intermediaries and over a dozen of the top financial institutions in this particular business services sector.
- Conducted a number of start-up projects and participatory company investments including BeneSource, Apex Global and BP Group over the period.
- A registered consultant with AAIMCO, Gerson Lehman and River Park Research.

Apex Global Partners

Apex Global Partners is a leading independent mixed practice international insurance broker providing a full range of risk management and insurance products and services catering to the middle market.

President – Dallas, Texas 2006 – 2008

Performed as the chief executive leader for Apex Global Partners. Operated as the central outward facing executive for the company towards clients, markets, carriers and acquisition opportunities. The central

challenge was building a foundational company that would scale for the development of clients, revenues and employees. Developed and implemented the strategic plan to roll-up commercial brokerage firms.

- Grew the company from zero to approximately \$12MM income (\$120MM premium revenues), making AGP one of the top five private brokerage operations in North Texas.
- Completed four acquisitions.
- In late 2008 the company was sold and I left, along with my M&A development group to pursue additional new high priority projects.

USI, Incorporated

USI is one of the world's largest diversified insurance and financial services firms focused on technology enabled, fully integrated delivery of insurance, financial and consulting services.

Division President – Metairie, Louisiana. 2003 – 2006

Full P&L responsibility for a \$15M income (\$150M premium revenues) division. Directed an operating team including 8 Business Unit Heads and 52 indirect reports, in five separate offices. Led this mixed practice brokerage firm, second largest in Louisiana, through the dislocation and rebuilding in the aftermath of Hurricane Katrina, positioning the company to capitalize in the rebuilding of the Gulf States.

- Drove the re-engineering of the sales process, resulting top line growth of 21.8% in last year.
- Elected to the USI Summit Team, a board of the top 25 USI Executives in the country.
- Resigned to build Apex Global Partners.

UNITED HEALTHCARE

UHC, a Fortune 50 company, the second largest provider of health and well-being services in the USA and a pioneer in the marriage of technology, data collection and health care delivery.

Division President & COO – Metairie, Louisiana 2001 – 2002

Chief Executive for the UHC companies in Mississippi and Louisiana, leading the operations of five separate offices in major markets. Accountable for full P&L (\$400M premium), leading a staff of 6 VP's and an indirect staff of 75. Major performance drivers included completing two acquisitions during 2002. The integration of The Oath and AmCare companies added 40K new customers (\$96M premium revenues). Joined the company to help lead the divisions through the integration of the two states into a region called the Gulf States.

MAXSOL INC.

MaxSol developed packaged software solutions to assist insurance related companies in Web enabling disparate and distributed backend databases. Core technology and application suites focused on solving e-sales & service opportunities.

Interim CEO / VP & General Manager - Concord, Massachusetts. 1999 - 2001

Joined the company to manage the development, operation and spinout of the insurance vertical market initiative. Within 60 days, was chosen by the Board to manage the firm, directed a staff of 15 including 3 VPs and an indirect staff of 53. The company went out of business at the height of the Dot com market crash.

BIRMAN & Associates

Birman & Associates was a consulting and managed care concern. The primary competency of the corporation was the ability to change physician practice behavior through the use of technology tools and peer level consultative services.

President & COO - Cookeville, Tennessee 1997 - 1999

Directed a staff of 6 VPs and an indirect staff of 80. Held full P&L responsibility for this concern with consulting activities in over 110 hospitals and management of two HMOs. A significant change in the regulatory environment concerning Medicaid and Medicare medical coding and billing ended the company.

FOUNDATION HEALTH SYSTEMS

Foundation was one of the largest public commercial managed care providers in the USA, headquartered in Sacramento, California. The company possessed significant strength in Medicaid, Medicare risk, Champus and employee benefits products.

VP & Chief Marketing Officer – Miami, Florida 1995 - 1997

Directed a staff of 9 VP's and an indirect staff of 225. Engineered the integration of three new managed care firms with two established companies and grew the division from \$210M in annual premium revenues to \$400M. Resigned when Foundation was being sold and I was offered the Presidency of Birman.

CIGNA 1981-1995

CIGNA is one of the largest public multi-line insurers in the world.

Vice President - Ohio Region, Columbus, Ohio. 1988 - 1995

Corporate Director - Managed Care National Accounts, Hartford, Connecticut. 1986 -1988

Corporate Director - Managed Care Marketing, Dallas, Texas. 1985 -1986

Director - Health Plan Marketing, Dallas, Texas. 1983 - 1985

Senior Account Executive, Dallas, Texas. 1981 - 1983

EDUCATION, ACCREDITATION & LICENSING

Master Business Administration - University of Phoenix, College of Graduate Business & Management

Bachelor Business Administration - Kent State University, College of Business

Accreditation - Health Insurance Association of America (Honors)

Certification - Advanced Business Management - American Management Association (University of Toledo)

Licensed - Life, Health, Accident and P&C products