



The company's history as told to WAP staff by Mel Rose at the announcement of Paul and Mari's Co-CEO promotions.

In June of 1994, after a long history of church ministry in upper Michigan, Mary and I resigned our ordination and left the regular pastoral Christian ministry, moving to Arizona. Mary had been assigned to two churches and I was assigned to three. We felt we were being called by God (and not the Church) to a ministry beyond the normal confines of the Church.

So in November of 1994, I interviewed with Jane Brooks, the Owner of A Best Brokerage Services, for a position she had available for a five-hour per day, part-time position. Jane owned a Long-Term Care Medicare Supplement insurance business.

When I asked Jane what her vision was for the future of her business, looking toward my own prospects, Jane replied that she had none, which was initially disheartening. However, she continued by saying she had not had the time to develop a vision because she was in the middle of a three year divorce battle where her husband had been trying to take the business away from her, even though he was not working in it. Upon asking her if she was interested in *creating* a vision and future if I came to work for her, she replied, "Yes."

Of course, that meant I had to study and obtain my insurance license, and January 2, 1995 was my first day working at A Best Brokerage. There was one other employee besides Jane.

About 18 years ago (February of 1998), I asked Mary to break her teaching contract at a private boys reform school to join our staff as Office Manager. However, she said that she wouldn't leave until we could pay her what she was making in her teaching position. I didn't know if I had the authority, yet, and Jane was out of the country on a spiritual quest, so it was a risky move, but I really needed her organizational skills and hired her.

In the spring of 1998, Jane saw an opportunity for an early retirement, and asked if I wanted to purchase the business. Since Mary and I did not have funds for such a transaction, she offered to sell it on contract with no money down. We saw it as quite an opportunity. July 1, 1998 was our first day as owners of A Best Brokerage Services.

Prior to hiring Mari and Paul, Mary and I had been observing some important characteristics in both of them in the jobs they currently held.

- Hard-working and ambitious
- Focused on serving clients
- Considerable potential

After completing our normal business interview process, we hired Mari on June 1, 1998, and Paul on March 15, 1999.

We changed the business name from A Best Brokerage to Western Asset Protection (WAP) in June of 2000. Paul and Mary designed WAP's original logo.

This is where I have to skip 15 years in the interest of time. About two years ago, I began to feel my vision for WAP was mostly accomplished. We had:

- Created branding
- Created a legacy of setting the highest standards for doing business
- Inspired success for many
- Helped WAP staff and agents when needed
- Created a successful work environment
- Created WAP Gives Back. (This concept is still in its infancy. We have done some wonderful things for charity and our community, but we are looking forward to making an even greater impact.)

To you, our wonderful team, thank you! While we are not perfect, we diligently strive with you for the best possible outcome of every situation. You are the key to what WAP has become. We could not be who we are without you. Let's continue to reach for the STARS – for our highest potential!

In the last few years, as I explored "Succession Planning," Paul and Mari were challenged to find their own vision for WAP.

Today is a NEW day. It is time for an official change in leadership. I have made the decision to step down from my position as CEO.

In order for this new vision to be developed into a future full of terrific possibilities and opportunities, we need great leadership. As Paul and Mari have the passion, drive, and complementary leadership skills, and have been diligently working their way through every aspect of the business for the last 17 years, WAP's Board of Directors has offered them the position of Co-CEOs. (They didn't take very long to decide to accept!) They are already receiving some incredible coaching and training for their new positions that should well equip them to become the best Co-CEOs possible and take WAP into a very exciting future.

I will continue as Owner and Chairman of the Board, continuing to be involved in some transitional responsibilities, especially in finances. Mary will continue as my Managing Partner and assist with special projects. We will office at WAP-2.

I cannot wait to watch WAP reach new heights with Paul and Mari's leadership and the amazing team we are blessed to have in each of you!

Please join me in congratulating Paul and Mari as Co-CEOs!