

Learn how  
**L&M** is working with  
**PolicyPro** to bring you  
speed, service, and  
savings



**PolicyPro**

## SPEED, SERVICE, AND SAVINGS

PolicyPro is an insurance agency headquartered in Houston, Texas. The agency prides itself on providing the lowest possible rates for their clients in all categories of insurance. PolicyPro utilizes proprietary technology in their RateFinder™ application to pull data from multiple sources to assist clients in selecting the best option.

## THEIR STORY

PolicyPro was launched in 2012 by CEO and founder Bobby Fazio. Bobby built a strong team and a service-minded company that now manages a large and growing client base. The company continues to seek new ways to provide efficiency and savings to reduce stress and save money for their customers.

### RateFinder™

Are you paying too much for home insurance? Give us three facts about your home and we will show you the lowest premium available from over 40 A-rated insurance companies.

Start Saving. Start Living.™

The image shows a digital form for the RateFinder™ application. At the top, three yellow circles with blue outlines are numbered 1, 2, and 3. Below these, a dark blue rectangular box contains three input fields: 'Sq. Ft.' (a text box), 'Zip Code' (a text box), and 'Year Built' (a dropdown menu with a blue arrow icon). Below this box is a lighter blue button with the text 'Click for Estimate' in white, flanked by small yellow arrow icons. The entire form is set against a white background with a subtle yellow shadow effect.

CLIENT CASE STUDY

# POLICYPRO

[www.lloydmousilli.com](http://www.lloydmousilli.com) | 512.609.0059 | [info@lloydmousilli.com](mailto:info@lloydmousilli.com)

**INDUSTRY:** Financial Services

**COMPANY SIZE:** Small Business (1-25 employees)

**LOCATION:** Houston, Texas

## SERVICES UTILIZED

Trademarks

Sub-Producer Service Agreement

Asset Purchase Contract

Litigation

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Navigating the turbulent waters of running your own company in today's business environment is troubling enough without the advice of professional counsel. Having L&M at the legal helm has proven to be the ideal choice time and time again. Within my organization, it goes without saying that the brilliant minds at Lloyd & Mousilli create the safe harbor where all of my ships safely moor at night.”



**Bobby Fazio,**  
Founder and CEO

**LLOYD&MOUSILLI**

ATTORNEYS AND COUNSELORS AT LAW



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## GROWTH WITH L&M

L&M has served PolicyPro as both their corporate and litigation counsel. This broad relationship has allowed the firm to provide strategic guidance in a variety of areas, including intellectual property, sub-producer service agreements, and asset purchase contracts.

## TRADEMARKS

L&M's extensive experience with state and federal trademark procedures allowed them to effectively assist PolicyPro with the application process. The firm helped the company secure trademarks for their logo, services, and slogan. Establishing intellectual property protections from the beginning stages of a company is crucial. As PolicyPro continues to grow, the founders can be sure that their brand will remain shielded from infringement.

## SUB-PRODUCER SERVICE AGREEMENTS

L&M worked with PolicyPro to draft sub-producer service agreements to be executed with other agencies. These agreements establish the terms and conditions of PolicyPro's services, outlining the scope and expectations of the work to be rendered.



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## ASSET PURCHASE CONTRACTS

L&M guided PolicyPro through the drafting and execution of multiple contracts to sell business assets. The firm worked with the company to determine its long-term financial vision, and to design an execution plan. The establishment of solid contract agreements has allowed PolicyPro to grow significantly, while remaining adequately protected legally.

## LITIGATION

In addition to providing corporate services to PolicyPro, L&M has also assisted the company in both state and federal litigation matters. The firm's substantial knowledge of the structure and foundation of the company was invaluable in determining the best course of action regarding litigation. Through collaboration efforts between L&M's corporate and litigation teams, the firm was able to obtain ideal outcomes for PolicyPro.





A photograph of a man and a woman embracing in front of a two-story house. The man is wearing a blue denim shirt and the woman is wearing a red and black plaid shirt. The house has brown siding, white trim, and a dark roof with dormer windows. The scene is set outdoors with greenery in the background.

READY TO LAUNCH ?

# LLOYD & MOUSILLI

ATTORNEYS AND COUNSELORS AT LAW

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Schedule a **free** consultation at  
**[lloydmousilli.com](https://lloydmousilli.com)**

Reach out if you are interested in  
partnering with L&M to grow your  
business