

LEADERSHIP | EDUCATION | COMMUNITY
WILLIAMSON PROSPERS



WILLIAMSON
COUNTY, TENNESSEE
ECONOMIC DEVELOPMENT



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“MedSolutions has benefitted significantly from the decision to base our operations in what we consider the heart of our nation’s healthcare capital. As home to a growing and vibrant business community, Williamson County offers our company the chance to collaborate with other industry leaders while providing employees with rich quality of life.”

Curt Thorne, President & CEO of MedSolutions, Inc.



Accessible

Easy access to east coast population centers



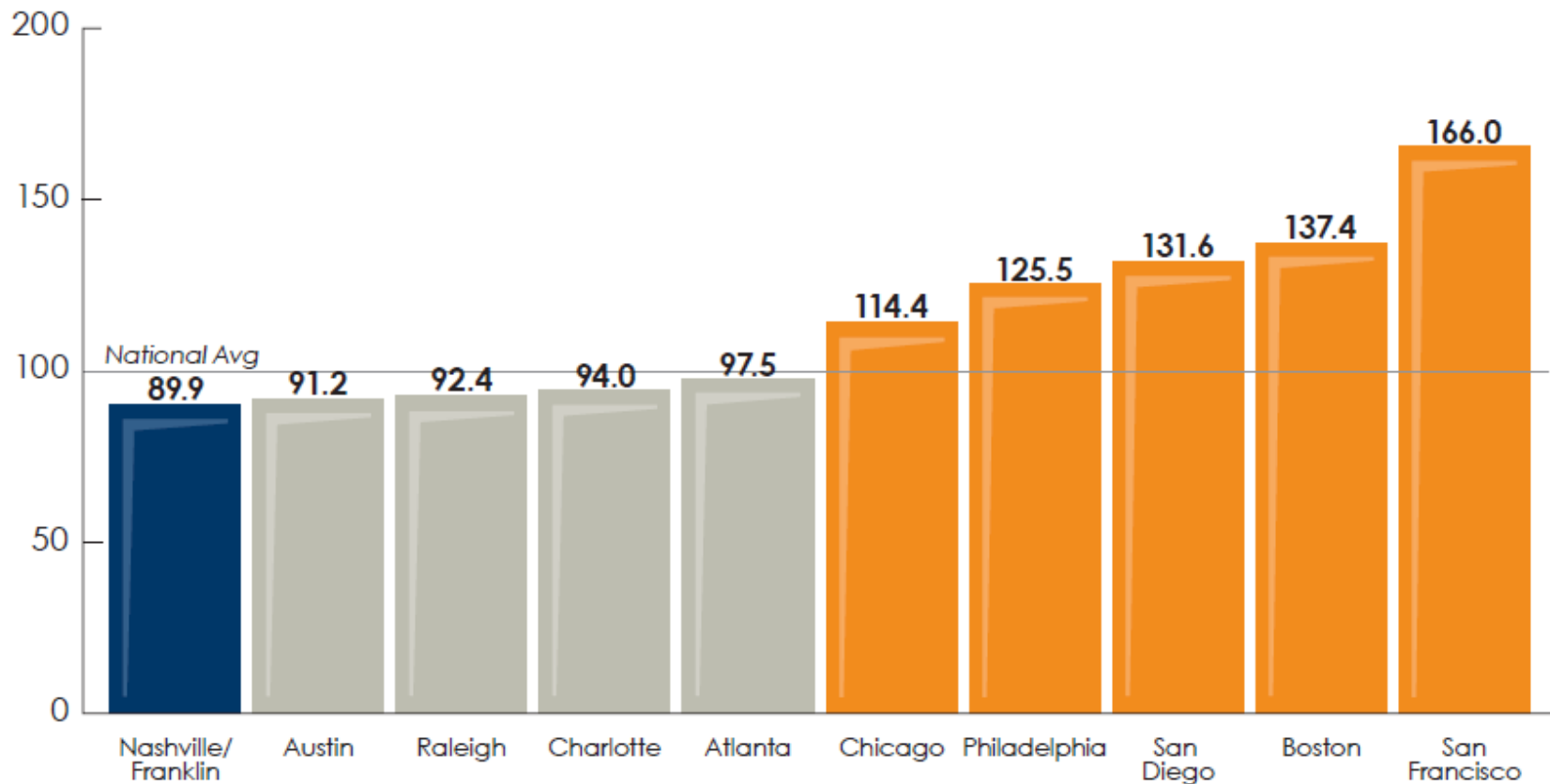
- A day's drive from 75% of the U.S.
- Interstate 65 and Highway 840 run through Williamson County
- I-40 and I-24 surround and connect creating a grid for easy accessibility and transportation
- 30 minutes from Nashville International Airport serving 48 non-stop markets per day





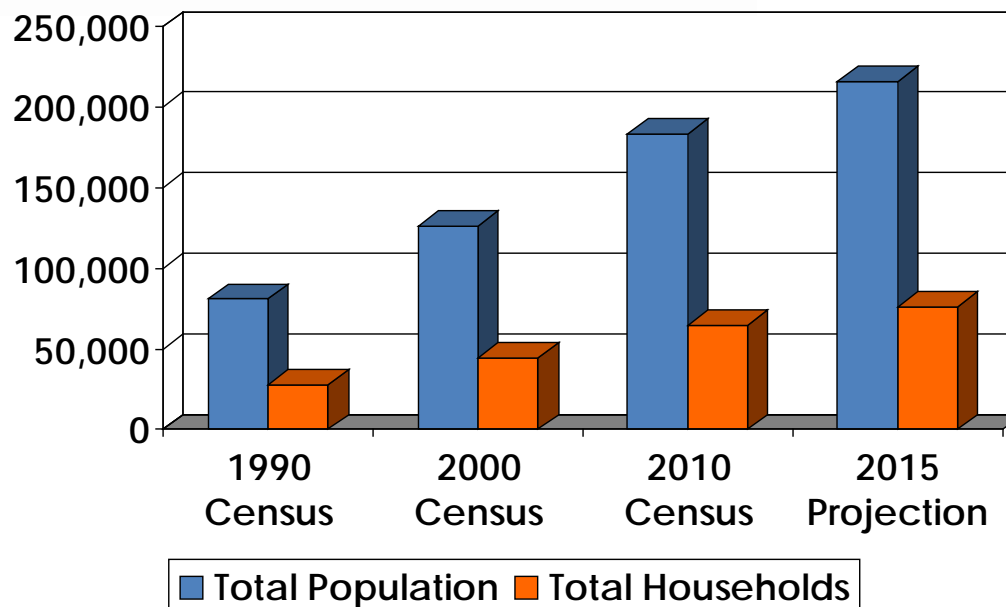
Affordable

ACCRA Cost of Living Index 4th Quarter 2011





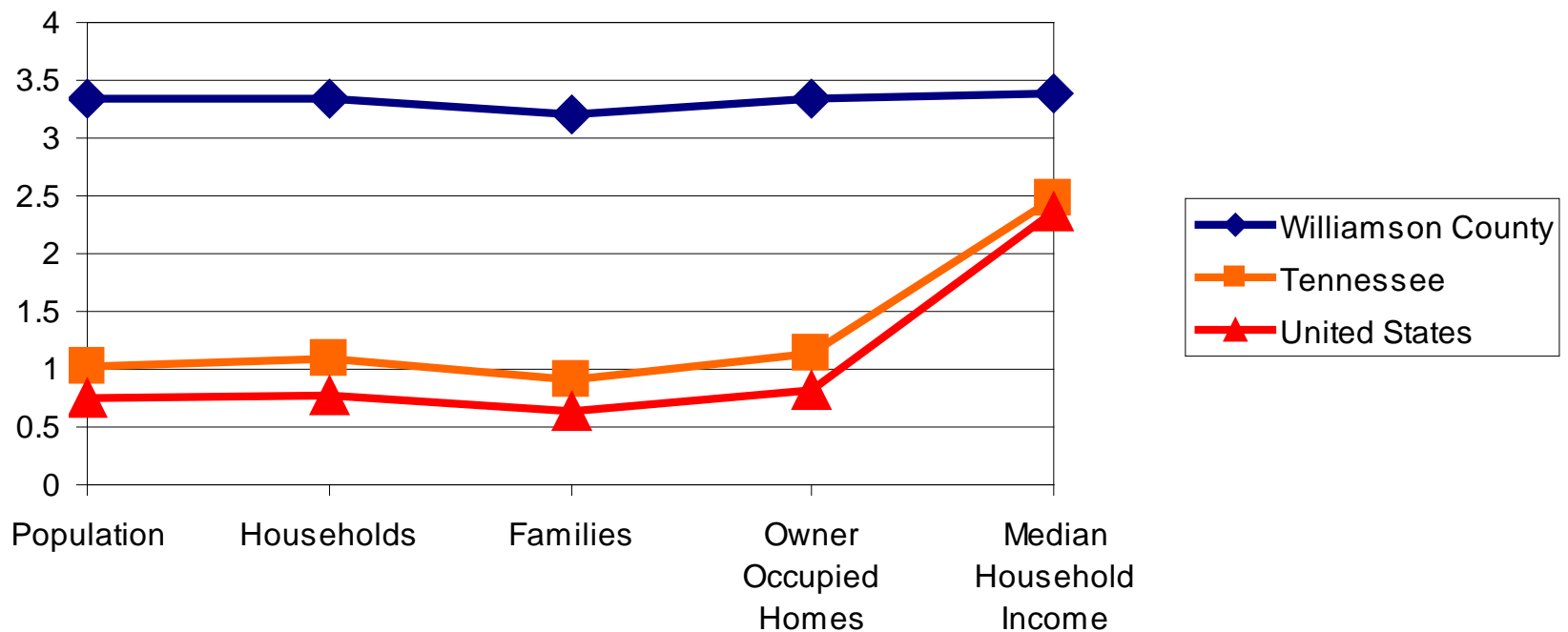
Dynamic
Fastest growing county in TN



	1990 Census	2000 Census	2010 Census	2015 Projection
Total Population	81,020	126,638	183,182	215,891
Total Households	27,927	44,725	64,886	76,341

Source: US Census Bureau, 2010

Projected 2010-2015 Annual Growth by Percentage



Source: ESRI Business Analyst Projections, 2011



Talent

Rates consistently below region & state average



Tennessee

Labor force	3,099,800
Unemployment rate	7.8%

Nashville Region

Labor force	829,140
Unemployment rate	6.5%

Williamson County

Labor force	95,670
Unemployment rate	5.3%

Source: Tennessee Department of Labor and Workforce Development, May 2012

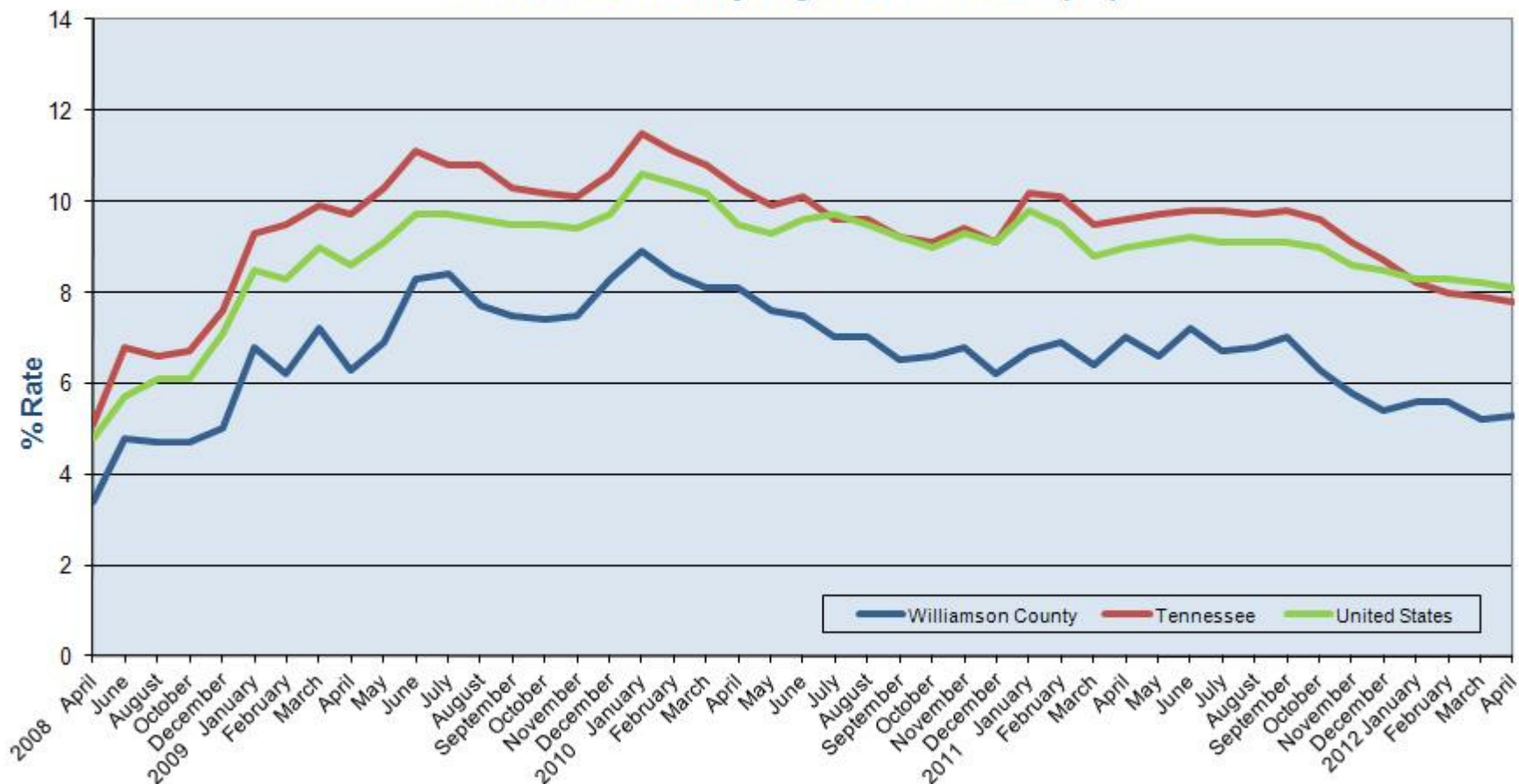


Talent

Historically outperformed state and US



Historic Unemployment Rates (%)

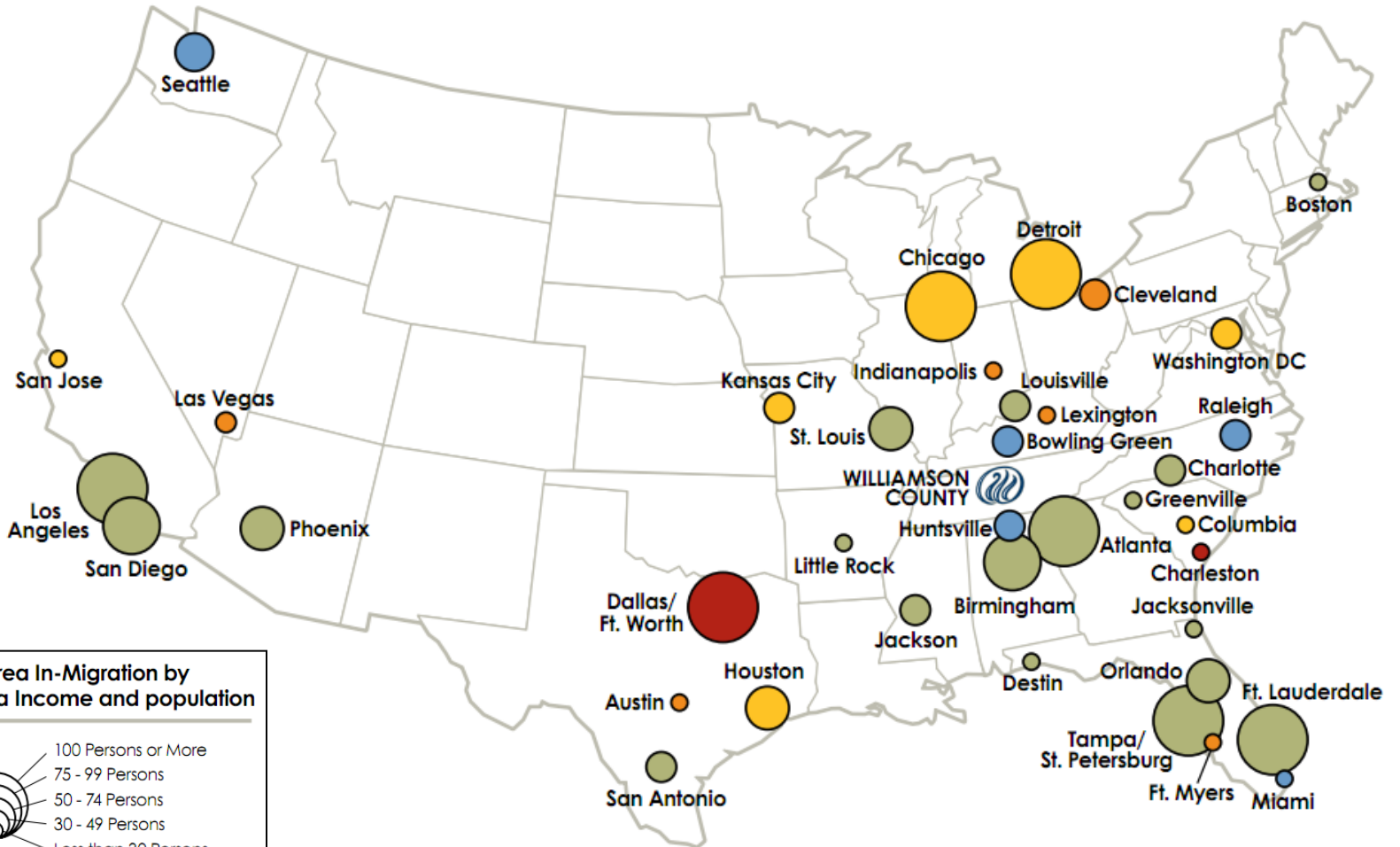


Source: Tennessee Department of Economic and Community Development Research



Talent

Growth through in-migration



Source: Internal Revenue Service, 2009



Transfer Appeal

Proven record of relocating talent



% of workforce that chose to relocate

NISSAN

42% of workforce
80% of executives
From Los Angeles, 2005

MARS

petcare
us

82% of workforce
From Los Angeles, 2006

The Verizon Wireless logo, featuring a red checkmark-like symbol above the word "verizon" in a bold, sans-serif font, with "wireless" in a smaller font to the right.

50% of financial service workforce
From Tampa, FL, 2008

The VGT logo, featuring a red sphere to the left of the letters "VGT" in a bold, sans-serif font, with "VIDEO GAMING TECHNOLOGIES, INC." in a smaller font below it.

45% of IT workforce
From Charlottesville, VA, 2012

JACKSON

NATIONAL LIFE INSURANCE COMPANY

90% of IT workforce
From Lansing, MI, 2012



Talent and Public Education

Far outperforms state and US



EDUCATIONAL ATTAINMENT

Population 25 years and over

Associate's degree or higher

US

TN

Williamson
County

35.7%

29.3%

59.3%

2006-2010 High School Graduation Rate

2006

2007

2008

2009

2010

Williamson County

91.0

93.4

93.8

95.3

93.9

Middle Tennessee

88.3

88.0

85.8

87.4

N/A

Tennessee

80.7

81.8

82.2

82.2

86.1



Talent

Pipeline of future employees



24 colleges and universities
8 community colleges
14 career colleges

with 88,398 students
with 32,103 students
+ with 9,095 students

129,596 students
currently enrolled
in the Nashville
region

Source: 2010 enrollment data



Employer of Choice
Evidence of strong applicant pool



NISSAN

Received 40,000 applications
for 700 jobs in 2005

JACKSON[®]
NATIONAL LIFE INSURANCE COMPANY

Received 4,000 applications
before they posted a single job in 2010



Talent

Signs of sustained economic strength



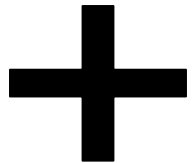
Since 2000



Employment Growth



Population Growth



Low

Unemployment Rate

Corporate relocations, growth of existing industry, & entrepreneurial dynamism

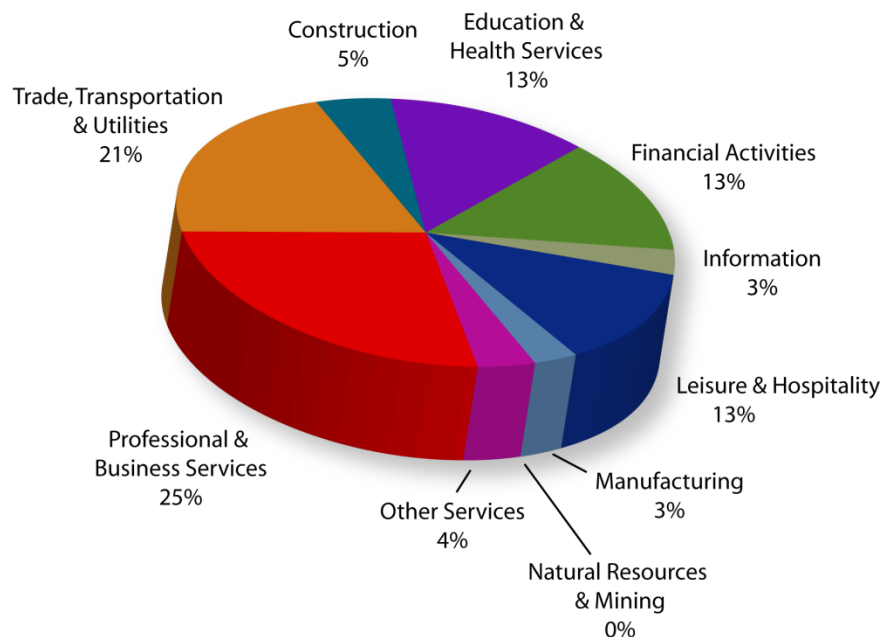


“Jackson looked at a variety of different communities to open a regional headquarters office. We ultimately selected Williamson County because of the strong talent pool due to its proximity to nationally recognized academic institutions, the quality of life the area offers our employees, and most of all the welcoming spirit of the local community. We couldn’t be happier with our decision.”

Mike Wells, President & CEO of Jackson National Life Insurance



Economic Diversity in Williamson County



Supersector	Employment, Dec. 2009	Location quotient, Dec. 2009
Construction	4,144	1.04
Education & Health Services	9,578	0.72
Financial Activities	9,900	1.84
Information	1,979	1
Leisure & Hospitality	9,824	1.09
Manufacturing	2,251	0.27
Natural Resources & Mining	210	0.18
Other Services	3,055	0.98
Professional & Business Services	19,005	1.6
Trade, Transportation & Utilities	16,302	0.91

The location quotient is the ratio that compares the concentration of employment in a certain sector in Williamson County to the concentration of employment of that sector in the United States.



Sector Growth

Nashville Business Journal Analysis



MANAGEMENT

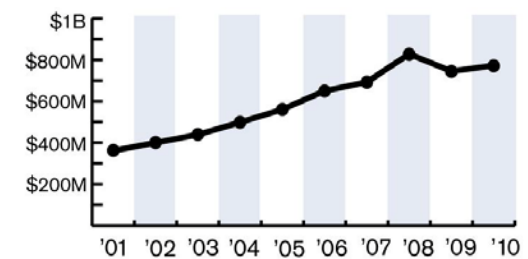
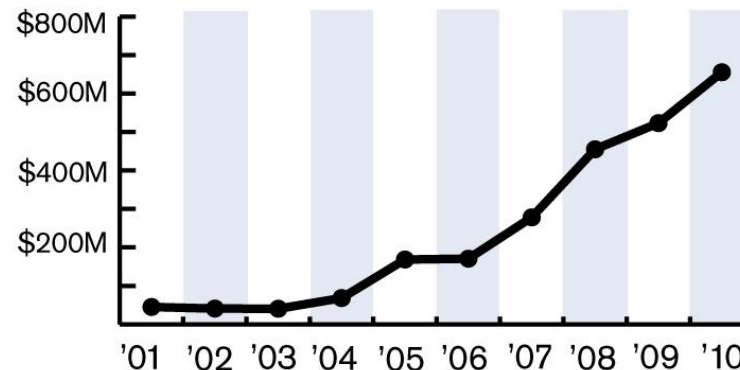
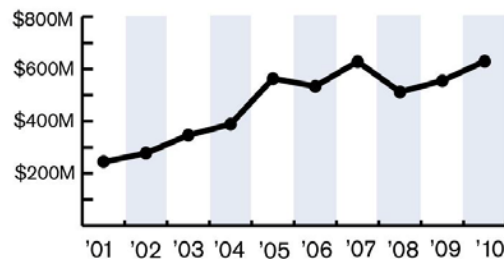
The story of the last decade for Williamson County has been a string of corporate relocations. Management salaries have grown more than 1,300 percent in Williamson County over the decade.

PROFESSIONAL, SCIENTIFIC, TECHNICAL

This reflects the brainpower that moved to Williamson County last decade. It's the largest segment overall and has grown 112 percent since 2001. Still, the recession made its mark – trimming \$83 million between 2008 and 2009.

HEALTH CARE

Another strong performer for Williamson County was the health care industry, which saw overall compensation rise by 160 percent over the last decade.



Source: Nashville Business Journal, June 2012

http://www.bizjournals.com/nashville/print-edition/2012/06/08/williamson-countys-growth.html?s=image_gallery



MARS
petcare



Corporate Image

Over 200 companies with corporate functions



NISSAN

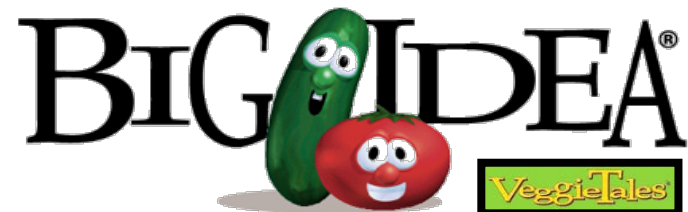


tasti D·lite™



MARS

petcare
us



Major Employers

Top 25

	Employer	2011 Local Employees	Description
1	Cool Springs Galleria	3,500	Shopping center
2	Williamson County Schools	3,435	School system
3	Community Health Systems	2,153	Operator of acute care hospitals in non-urban & mid-size markets
4	Williamson County Government/Services	1,842	County government
5	HCA	1,368	Patient accounting service center and physician services
6	Williamson Medical Center	1,350	County owned hospital
7	Verizon Wireless	1,300	Tennessee state headquarters for wireless provider
8	Nissan Americas	1,200	Automotive corporate headquarters for North & South America
9	United Health Group	1,200	Claims resolution and healthcare information management
10	Healthways	900	Comprehensive care enhancement & disease management services
11	Comdata Corporation	869	Transaction process solutions including payroll services
12	Ford Motor Credit	800	Customer care center for finance department
13	Mars Petcare (Pedigree, Wiskas, Nutro)	742	Headquarters for private label dry & semi-moist pet food co.
14	Lee Company	625	Commercial & residential integrated facility solutions
15	Tractor Supply Company	552	Owns and operates retail farm and ranch stores
16	MedSolutions	550	Management of medical imaging services
17	Vanderbilt Medical Group	500	Physician services
18	Affinion Group	500	Customer engagement and loyalty solutions
19	AT&T	500	Disaster recovery center, call center, and retail stores
20	DaVita	450	Billing office for company that provides dialysis services
21	LifePoint Hospitals	400	Develops community based hospitals in non-urban areas
22	Simplex Healthcare	360	Provides a range of healthcare products to patients with diabetes
23	Lasko Products	350	Manufacturer of fans, humidifiers and heaters
24	Ozburn-Hessey Logistics	345	Provider of global supply chain management solutions
25	The Lampo Group (Dave Ramsey)	335	Financial seminars, radio show, television show, and web

Major Employers

Corporate Headquarters

Headquarter Company	2011 Local Employees	Description
Community Health Systems Inc.	2,153	Operator of acute care hospitals in non-urban & mid-size markets
Nissan Americas	1,200	Automotive corporate headquarters for North & South America
Healthways	900	Comprehensive care enhancement & disease management services
Comdata	869	Transaction process solutions including payroll services
Mars Petcare (Pedigree, Wiskas, Nutro)	742	Headquarters for private label dry & semi-moist pet food co.
Tractor Supply Company	552	Owns and operates retail farm and ranch stores
MedSolutions	550	Management of medical imaging services
Life Point Hospitals	400	Develops community based hospitals in non-urban areas
Ozburn-Hessey Logistics	345	Provider of global supply chain management solutions
The Lampo Group (Dave Ramsey)	335	Financial seminars, radio show, television show, and web
Passport Heath Communications	309	Revenue cycle management
Franklin American Mortgage	285	Privately-held mortgage banking firm
Medquist	275	Provides clinical documentation technology & services
LBMC	270	Professional services organization with 8 separate divisions
Walgreens Take Care Health	220	On-site healthcare for corporate clients
FRANCE, a Scott Fetzer Company	165	Provider of power solutions for lighting technologies
Delek (Mapco Express)	157	Diversified energy business - refining & retail
PureSafety	150	Provides software & information solutions for workforce safety & health
Iasis Healthcare	134	Owns and operates acute care hospitals
American HomePatient	107	Provides home oxygen therapy
Podiatry Insurance Company of America	106	Provider of professional liability insurance for podiatric physicians
BioMimetic Therapeutics	100	Development & commercialization of drug-device combination products
Journal Communication	90	Custom media company
Dialogics Communications	83	Emergency notification and call center
HealthSpring	67	Coordinated care plans, primarily focused on Medicare Advantage plans
Designed Conveyor Systems	65	Designs, builds & installs conveyer systems
Noranda Aluminum	65	Manufacturer of primary aluminum, aluminum foil and light gauge sheet
Vaco	60	Accounting, financial, IT and administrative professionals staffing
Advocat	58	Operates long-term care and assisted living facilities
CLARCOR	54	Provider of filtration products and services
MyOfficeProducts	51	Online office supply distribution
Southern Land Company	48	Full service development company
Tasti D Lite	30	Healthy desserts retailer
Avure Technologies	30	Isostatic processing, sheet metal forming, and food processing HQ
Carlisle Transportation Products	30	Supplier of metal stampings, assemblies & die casting products
Tadano Mantis	26	Manufactures hydraulic crawler cranes
Integra Software Systems	16	Provides loan origination software to mortgage lenders
Big Idea Inc.	11	Value-based consumer entertainment production company
Tom James	9	Manufacturer and retailer of custom-made, luxury clothing
FAB Industries	6	Provider of alternative fuel storage systems

Major Employers

Health Care

Health Care Company	2011 Local Employees	Description
Community Health Systems Inc.	2,153	Operator of acute care hospitals in non-urban & mid-size markets
HCA	1,368	Patient accounting service center and physician services
United Health Group	1,200	Claims resolution and healthcare info management
Healthways	900	Comprehensive care enhancement & disease management services
MedSolutions	550	Management of medical imaging services
DaVita	450	Billing office for company that provides dialysis services
LifePoint Hospitals	400	Develops community based hospitals in non-urban areas
Simplex Healthcare	360	Provides a range of healthcare products to patients with diabetes
Passport Health Communications	309	Revenue cycle management
Medquist	275	Provides clinical documentation technology & services
Walgreens Take Care Health Systems	220	Provides integrated workplace healthcare solutions
Renal Advantage	205	Provider of outpatient dialysis services
Brookdale Senior Living	200	National senior living and health care provider
Corisen	200	Contracts to provide managed health care services
Universal Health Services	200	Owens psychiatric hospitals and manages behavioral health units
American Endoscopy Services	155	Offers surgical support programs for rigid and flexible scope surgery
OnLife Health (formerly Gordian)	150	Delivers whole-person preference-based health coaching
Windsor Health Group	150	Managed healthcare co. operating government sponsored health plans
Iasis Healthcare	134	Owens and operates acute care hospitals
Podiatry Insurance Company of America	130	Provider of professional liability insurance for podiatric physicians
American HomePatient	112	Provides home oxygen therapy
Cogent Healthcare	100	Provides medical & management systems for hospitals
BioMimetic Therapeutics	100	Development & commercialization of drug-device combination products
Vision Consulting	100	Healthcare Information Technology (HIT) service provider/consultant
Dialogics Communications	83	Emergency notification and call center
APS Healthcare	80	Provider of specialty healthcare solutions
Acadia Healthcare	80	Develops and operates a network of behavioral health facilities
HealthSpring	67	Coordinated care plans, primarily focused on Medicare Advantage plans
CIMplify	63	Medical computer information management
Advocat	58	Operates long-term care and assisted living facilities
FTI Healthcare	50	Provides change management, financial advisory & consulting services
Capella Healthcare	42	Manages non-urban, general acute care hospitals
Ambulatory Services of America	25	Provides alternate-site health care services in partnership with physicians
Guardian Group	18	Provides long-term healthcare staffing in nursing, therapy & ICF/MR & psych
Advanced BioHealing	15	Research and sales office for bioengineered tissue products developer
Pet DRx	11	Provides veterinary primary care and services to companion animals
Protherics (BTG)	9	Biopharmaceutical research laboratory
Rare Disease Therapeutics	5	Biopharmaceutical co. focused on orphan products

Major Employers

Fortune 1000

2011 Fortune Rank	Employer	2011 Local Employees	Description
10	Ford Motor Credit ¹	800	Customer care center for finance department
16	Verizon Wireless	1,300	Tennessee state headquarters for wireless provider
22	United Health Group	1,200	Claims resolution and healthcare info management
32	Take Care Health Systems ²	220	Provides integrated workplace healthcare solutions
63	Nissan Americas	1,200	Automotive corporate headquarters for North and South America
90	HCA	1,368	Patient accounting service center and physician services
190	Community Health Systems	2,153	Operator of acute care hospitals in non-urban & mid-size markets
359	DaVita	450	Dialysis treatments and support services
576	Tractor Supply Company	552	Owns and operates retail farm and ranch stores
622	Life Point Hospitals	400	Developes community based hospitals in non-urban areas
641	HealthSpring	67	Coordinated care plans, primarily focused on Medicare Advantage plans
740	Vulcan Materials Co.	25	Crushed limestone and gravel
743	Iasis Healthcare Corp.	134	Owns and operates acute care hospitals
821	Brookdale Senior Living	200	National senior living and health care provider

¹ division of Ford Motor

² division of Walgreens



Public Education
#1 priority and #1 differentiator



America's Best High Schools 2010

5 schools in Williamson County were listed on Newsweek's Best High Schools list, **more than any other county in Tennessee**

- Brentwood High School
- Ravenwood High School
- Franklin High School
- Fairview High School
- Centennial High School

Newsweek picks the best high schools in the country based on how hard school staffs work to challenge students with advanced placement college-level courses and tests. Just over 1600 schools—only six percent of all the public schools in the U.S.—made the list.

Source: Newsweek 2010



Low cost of doing business



Local property tax rate ranges from
\$2.31 to \$3.60 per \$100 of assessed value

- ¢ 3rd lowest county tax rate in Nashville region
- ¢ Ranks below the average Tennessee county tax rate
- \$ No state income tax



Best places?

Yeah, we're on the list

Credentials
Consistently ranked near the top





Credentials

Consistently ranked near the top



One of the Best Cities for Startups

The Top 10 Cities for Startups



No. 8: Franklin, Tenn.

Population: 52,300

Patents per 10,000 pop.: 2.3

Creative Professionals: 15.1%

BA or Higher: 52.6%

Located in one of the nation's wealthiest counties, historic Franklin has a growing technology sector, including a new biotech campus under construction.



1. Boulder, CO
2. Boca Raton, FL
3. Santa Monica, CA
4. Bend, OR
5. Irvine, CA

6. Cambridge, MA
7. Bellevue, WA
8. Franklin, TN
9. San Francisco, CA
10. Rockville, MD

Ranking by: ZoomProspector.com and *Bloomberg Businessweek* 2010



Credentials
Consistently ranked near the top



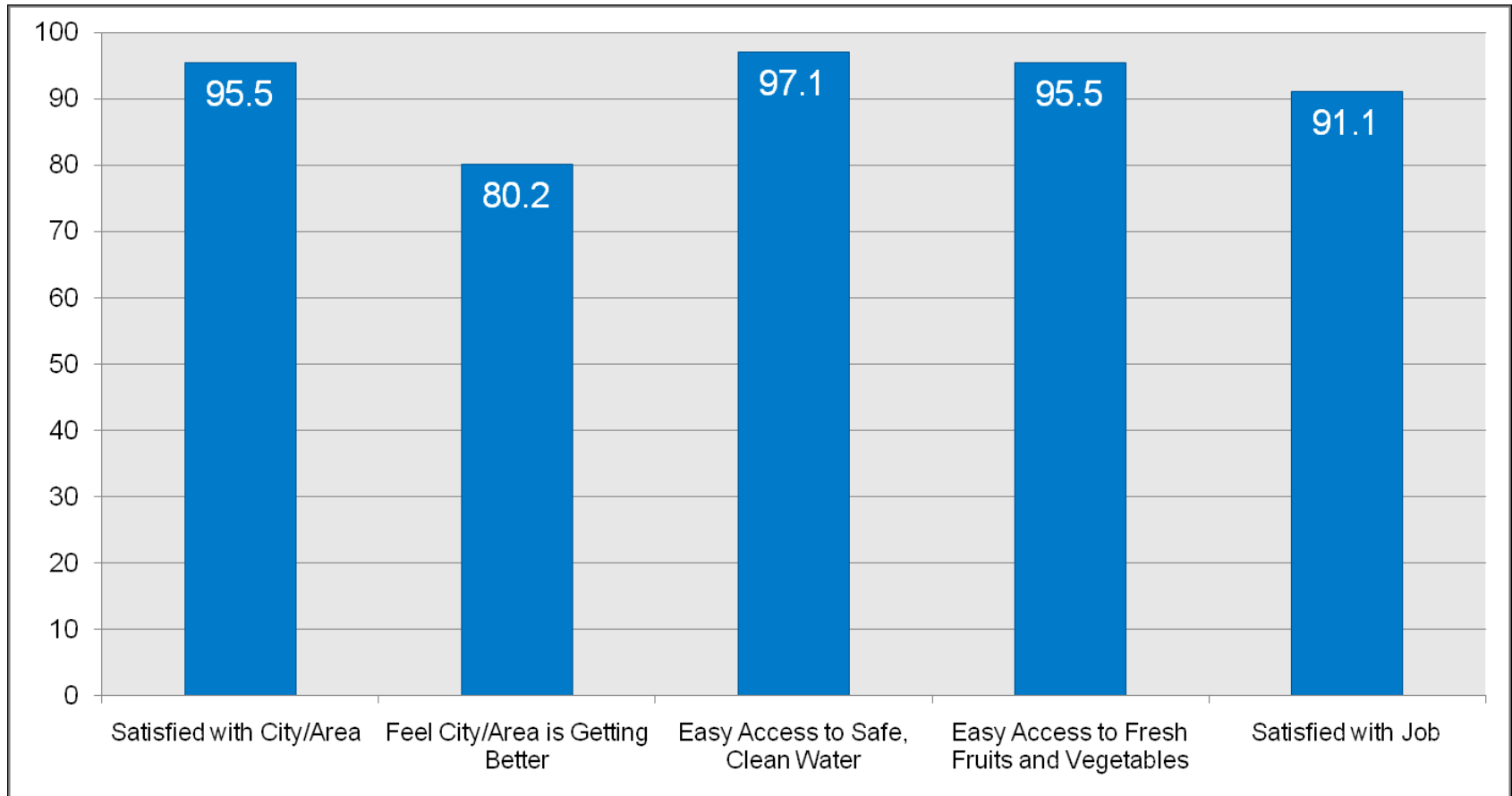
Healthiest County in Tennessee

Health Outcomes	1
Mortality	1
Morbidity	1
Heath Factors	
Health Behaviors	1
Clinical Care	1
Social & Economic Factors	1
Physical Enviroment	7

Source: 2012 County Health Rankings & Roadmaps
<http://www.countyhealthrankings.org/app/tennessee/2012/williamson/county/1/overall>



How do Williamson County residents feel?





Start-up activity
Healthy culture of entrepreneurship



25% of the fastest growing private
companies in Tennessee from the
2011 Inc. 500 || 5000 are in
Williamson County



The home for business



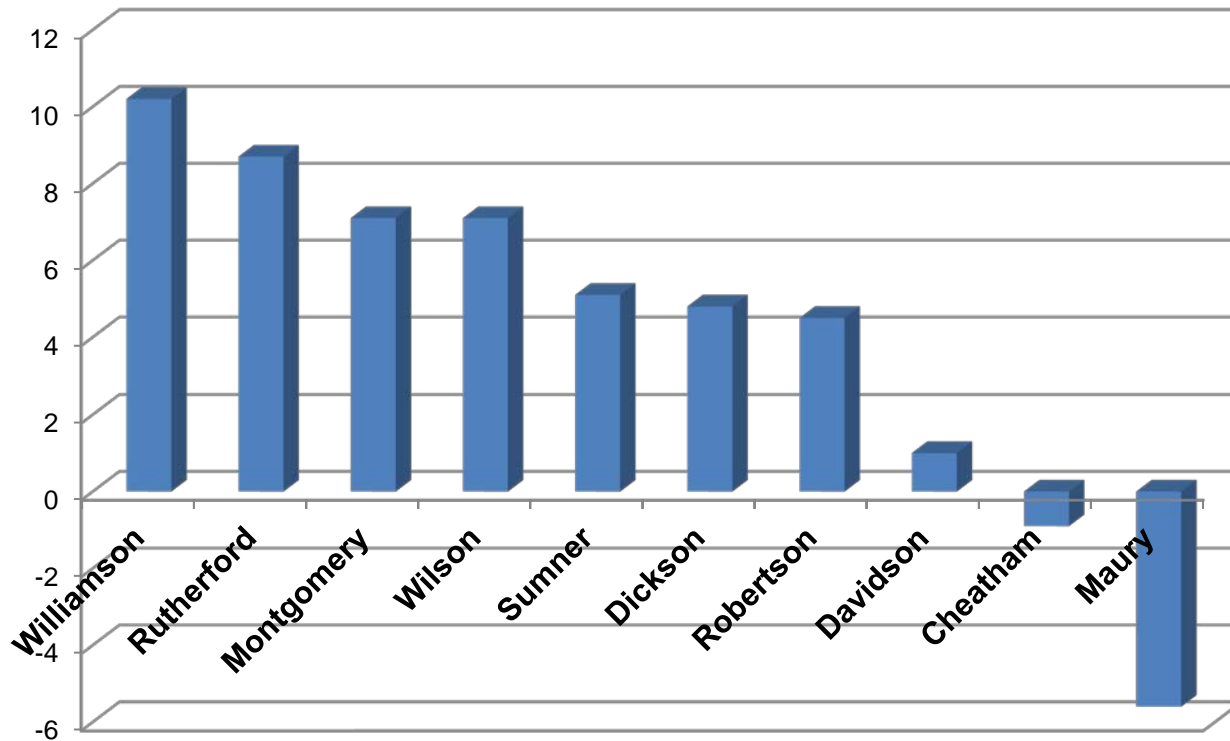
12 of the 25 largest publicly traded
companies in the Nashville region call
Williamson County home,
including #1-#5
and 7 of the top 10



Who has grown jobs in Nashville?



Nashville Region County % Employment Growth, 2007-2011



Nashville Region = 4.3%



Who has grown jobs in Nashville?

16. Williamson County, TN

16 of 25



BACK

NEXT



Towns include: Brentwood

Job growth (2000-2010): 35.0%

Evolving from farmland to bedroom community to business center, Williamson County has come a long way from its rural roots. In the last year, more than a dozen companies and government agencies have brought about 2,300 jobs to the area, according to the local economic development council.

Neighboring Rutherford County may host the plant that builds the Leaf, but

Williamson County is home to Nissan North America's headquarters, which provides 1,300 jobs. Cool Springs Galleria shopping center is the biggest employer, though, with 3,500 positions. Verizon Wireless recently added 300 customer service slots, and Healthcare Management Systems relocated, bringing 400 new jobs.

Williamson County wants small business to thrive, too. Its economic development council hosts a comprehensive website to help entrepreneurs get started. Resources include contact lists, how-to guides and a wealth of data. The site counts almost 800 new businesses in Williamson County this year.



COURTESY: VISITWILLIAMSON.COM

Source: Money.com
"Where the jobs are",
2011



“Moving the headquarters and the sales and marketing organization [to Williamson County, TN in 2006], I think, was a significant competitive advantage for Nissan. Our results speak volumes as to whether it was the right decision. Our market share has grown significantly, and I attribute a big part of our success and our potential to the fact that we are located here.”

Bill Krueger, Vice Chairman of Nissan Americas

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