PROFILE

PROJECT INSPIRE INC

27 PEARL ST PORTLAND ME 04101

+1 (207) 333-7580

http://www.localvets.com

MSID M84000668982195

EIN 832102599

NAICS codes

541940 - Veterinary Services

812910 - Pet Care (except Veterinary) Services

115210 - Support Activities for Animal Production

541211 - Offices of Certified Public Accountants

1,000 - 4,999 employees	\$ 1M - 10M revenue	\$ 1M - 10M revenue				
	2024	2023	2022	2021		
Eligible Employees	2,087	1,470	1,013	419		





CLARK INSURANCE A MARSH & MCLENNAN MARSH AND MCLENNAN AGENCY Benefits Broker



CLARK INS A MARSH & MCLENNAN A MARSH AND MCLENNAN AGENCY CL Broker



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MORNINSTAR Retirement Advisor/Consultant



BAKER NEWMAND AND NOYES Accounting Firm

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Key Indicators	M ^e	J								
KPI's	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015
Mega Wrap	M	M	M	M						
Collectively Bargained										
Self-funded Employee Benefits										
Filing with no Schedule A										
Multiple Employer (Welfare)										
Multiple Employer (Retirement)										
Filing Status	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015
Deliquent Filing										
First Welfare Filing				1						
Final Welfare Filing										
Extension Filed										

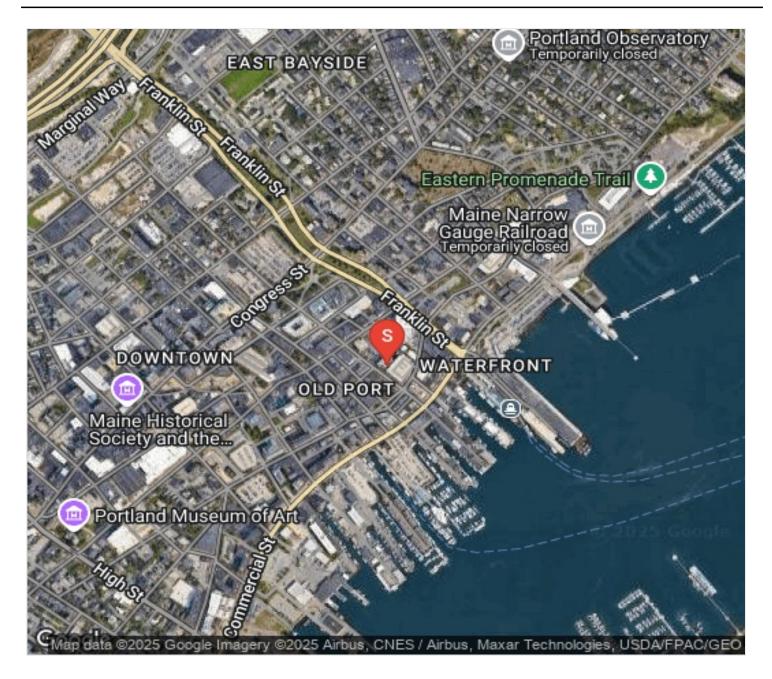


Top 5 Carriers for Maine

Rank	Carrier	Premium
1	ANTHEM	\$583,944,606
2	HARVARD PILGRIM HEALTH CARE	\$117,875,116
3	CIGNA	\$84,973,584
4	UNUM	\$36,269,468
5	AETNA	\$36,054,307

Top 5 Brokers for Maine

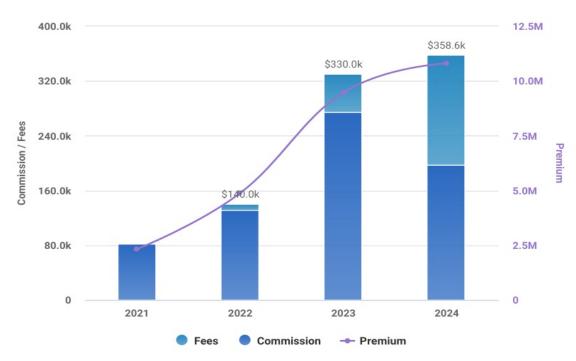
Rank	Broker	Commission	Fees
1	CROSS INSURANCE	\$4,095,671	\$333,868
2	MEABT	\$3,682,140	\$0
3	MARSH AND MCLENNAN AGENCY	\$1,089,556	\$53,778
4	MERCER HEALTH AND BENEFITS	\$966,092	\$47,795
5	USI INSURANCE SERVICES	\$871,890	\$118,060



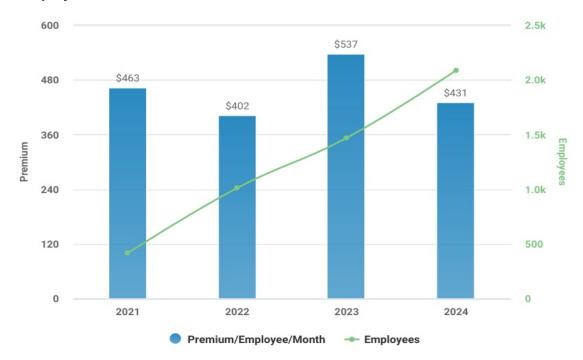
INSIGHTS

BENEFITS

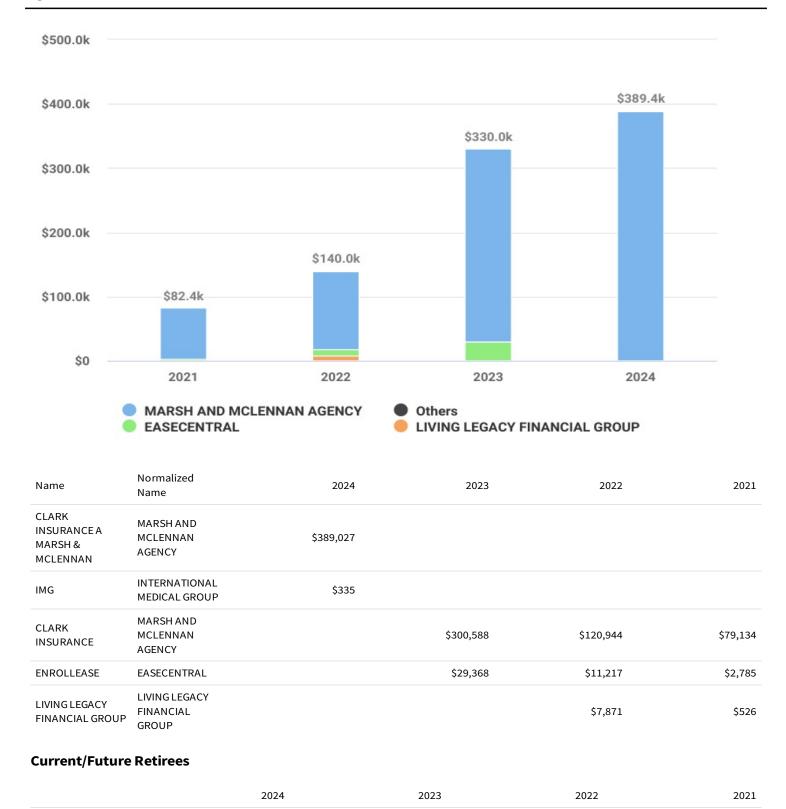
Premium, Commission and Fees



Premium per Employee



Broker History



22

45

14

14

Spend By Carrier

Current Retirees

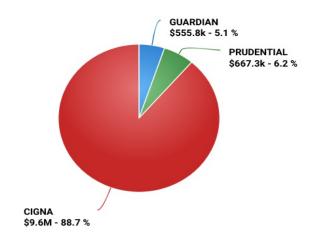
Future Retirees

61

0

5

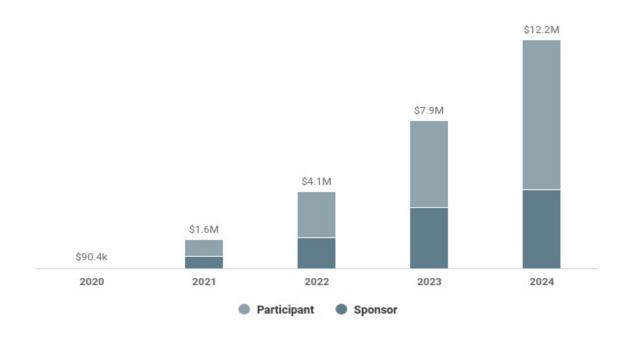
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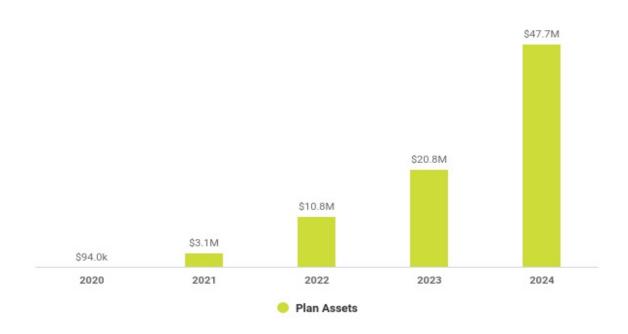
Name	Plan Types	Premium
CIGNA	Health Dental Vision Prescription Drug	\$9,580,390
PRUDENTIAL	Life LT Disability	\$667,276
GUARDIAN	Dental Vision Life ST Disability LT Disability	\$555,796

RETIREMENT

Contributions



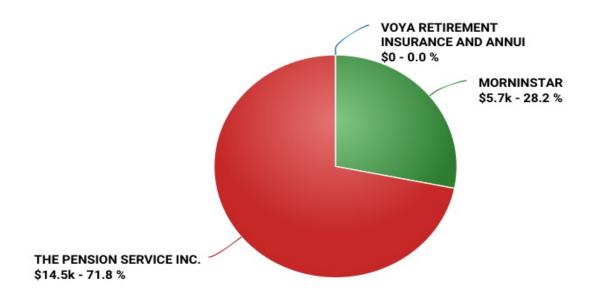
Plan Assets



Fidelity Bond

		Renewal	Beginning Assets	Ending Assets	Bond Amount	Ratio
16	RAREBREED VETERINARY PARTNERS 401(K) PLAN	01/01/2024	\$20,800,698	\$47,697,616	\$500,000	2.4%

Spend by Retirement Service Provider



Service Provider Name	Service Types	Total Compensation
THE PENSION SERVICE INC.	Unassigned - other services	\$14,529

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PROJECT INSPIRE INC

MORNINSTAR	Advisers - Investment Advisory (Plan)	\$5,697
VOYA RETIREMENT INSURANCE AND ANNUI	Participant Payments - Investment Advisory (Participants)	\$0

PLANS AND SERVICES

Benefits Plans

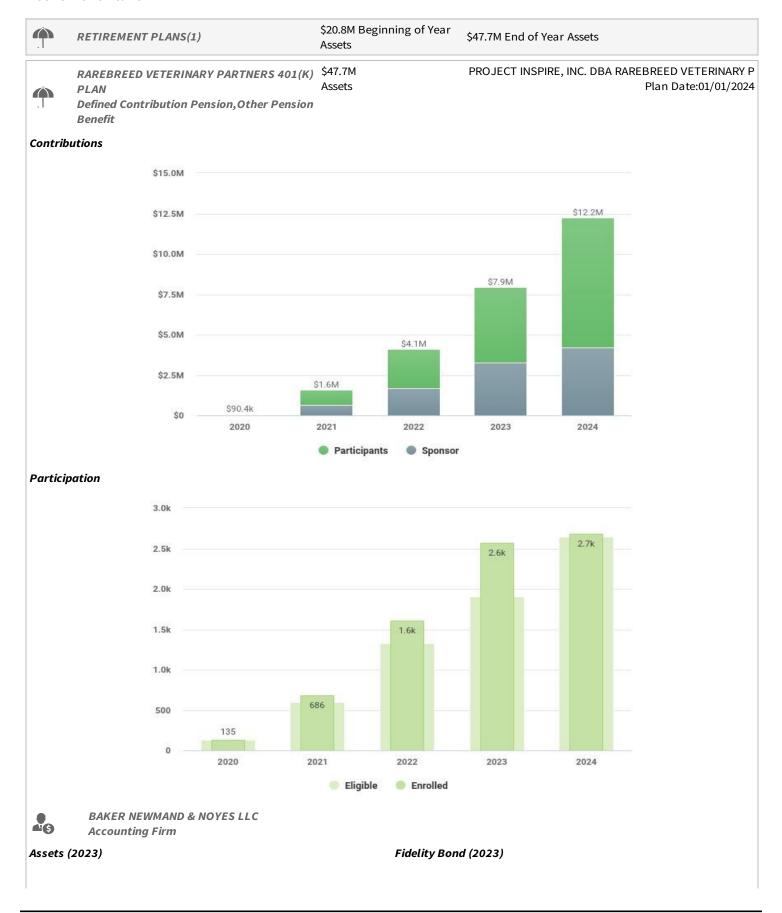
1	BENEFITS PLANS(3)	\$10.8M Premium \$358.6k Revenue	\$197.5k Commissi	on \$161.2k Fees
÷	Health Dental OV Vision Plndemr	nity R Prescriptio	n Drug	RAREBREED VETERINAR PARTNER Renewal: 01/01/202
	Carrier CIGNA HEALTH AND LIFE INSURANCE COMPANY AND AFFILIATES CIGNA	Premium \$9.6M	Participants 2,087	Premium/Participant/Month \$383
	Broker CLARK INSURANCE A MARSH & MCLENNAN (, ME) MARSH AND MCLENNAN AGENCY	Revenue \$284.3k 2.97%	Commission \$132.7k 1.38% (2.41%)	Fees \$151.6k 1.58%
	Broker CLARK INSURANCE A MARSH & MCLENNAN (, ME) MARSH AND MCLENNAN AGENCY	Revenue \$284.3k 2.97%	Commission \$132.7k 1.38%	Fees \$151.6k 1.58%
Detail Contra Line o	act # 345409 f Business Health,Dental,Vision,Prescript			RAREBREED VETERINAR
	Life Long Term Disability OO Voluntary	y (All) OCritical III	Iness/Cancer	PARTNER Renewal: 01/01/202
	Carrier PRUDENTIAL INSURANCE COMPANY OF AMERICA PRUDENTIAL	Premium \$667.3k	Participants 1,882	Premium/Participant/Month \$30
		Revenue \$83.3k 12.49%	Commission \$83.0k 12.44% (6.96%)	Fees \$335 0.05%
	Brokers MARSH & MCLENNAN AGENCY LLC (TEMPE, AZ) MARSH AND MCLENNAN AGENCY	Revenue \$83.0k 12.44%	Commission \$83.0k 12.44%	Fees \$0 0.00%
	IMG (INDIANAPOLIS, IN) INTERNATIONAL MEDICAL GROUP	Revenue \$335 0.05%	Commission \$0 0.00%	Fees \$335 0.05%
Oetail Contra ine o		bility,BASIC AD&D, VC	DLUNTARY AD&D, LTD, ACC	IDENT, CRITICAL ILLNESS
7?•	Dental Vision Life Temporar	ry Disability 槳 Lor	ng Term Disability	RAREBREED VETERINAF PARTNER Renewal: 01/01/202
/olur				
	Carrier THE GUARDIAN LIFE INSURANCE COMPANY OF AMERICA GUARDIAN	Premium \$555.8k	Participants 1,875	Premium/Participant/Month \$25

		\$-9,033 -1.63%	\$-18,210 -3.28% (4.75%)	\$9.2k 1.65%
2 0	Brokers	Revenue	Commission	Fees
	1005T303 (PORTLAND, ME)	\$12.6k	\$12.6k	\$0
	MARSH AND MCLENNAN AGENCY	2.26%	2.26%	0.00%
N N	000NW672MARSH & MCLENNAN AGENCY LLC (,	Revenue	Commission	Fees
	ME)	\$9.2k	\$0	\$9.2k
	MARSH AND MCLENNAN AGENCY	1.65%	0.00%	1.65%
Detail s Contra				

Line of Business Dental, Vision, Life Insurance, Temporary disability, Long-term disability, AD&D, ACCIDENT, VOLUNTARY CRITICAL

ILLNESS

Retirement Plans



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Beginning Ending	\$20,800,698 \$47,697,616 \$500,000(2.4%)	
Average participant balance Plan Descriptions	\$17,790	
2E Profit-sharing 2G Total participant-directed Plan 2K Stock bonusCode section 401(m) 3D Pre-approved pension plan **Advisors**	2F ERISA section 404(c) Plan 2J Code section 401(k) feature 2T Default investment account Participant Payments	
MORNINSTAR Unassigned	\$5,697 VOYA RETIREMENT INSURANCE AND ANNUI	\$0
THE PENSION SERVICE INC. Other Plan Details	\$14,529	
Participant Loans	\$208,015 Retirees Current/Future	11/583

Benefits Services



BENEFITS SERVICES

This company has not reported any Benefits Services

Retirement Services

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400	RETIREMENT SERVICES	(3)	\$0 Direct Comp	pensation	\$20.2k Indirect Compensation	
00	THE PENSION SERVICE I Retirement - Unassigned		\$14.5k Total Co	ompensation	PROJECT INSPIRE, INC. DBA RAREBRE RAREBREED VETERINARY PARTI	
EIN		060874395	I	Direct Compe	ensation	\$0
Service	Description	other services	1	Indirect Com	pensation	\$14,529
			-	Total Compe	nsation	\$14,529
00	MORNINSTAR Retirement - Advisers		\$5.7k Total Co	mpensation	PROJECT INSPIRE, INC. DBA RAREBRE RAREBREED VETERINARY PARTI	
EIN		363297908	ı	Direct Compe	ensation	\$0
Service	Description	Investment Advisory	(Plan)	Indirect Com	pensation	\$5,697
				Total Compe	nsation	\$5,697
00	VOYA RETIREMENT INSU Retirement - Participant		\$0 Total Comp	ensation	PROJECT INSPIRE, INC. DBA RAREBRE RAREBREED VETERINARY PARTI	
EIN		710294708	1	Direct Compe	ensation	\$0
Service	Description	Investment Advisory	(Participants)	Indirect Com	pensation	\$0
			-	Total Compe	nsation	\$0

INFLUENCERS



Benefits Brokers

MARSH AND MCLENNAN AGENCY	99.91%	\$389,027
CLARK INSURANCE A MARSH & MCLENNAN MARSH AND MCLENNAN AGENCY	, ME	\$284,298
MARSH & MCLENNAN AGENCY LLC MARSH AND MCLENNAN AGENCY	1050 W WASHINGTON ST TEMPE, AZ	\$83,002
0005T303 MARSH AND MCLENNAN AGENCY	2385 CONGRESS ST PORTLAND, ME	\$12,550
000NW672MARSH & MCLENNAN AGENCY LLC MARSH AND MCLENNAN AGENCY	, ME	\$9,177
NTERNATIONAL MEDICAL GROUP	0.09%	\$335
IMG INTERNATIONAL MEDICAL GROUP	2960 N MERIDIAN ST INDIANAPOLIS, IN	\$335

Total for PROJECT INSPIRE INC - 2024 Benefits Broker Commission and Fees

\$389,362



CL Brokers

Latest Policy Date: 06/12/2024 **PORTLAND** CLARK INSURANCE A MARSH AND MCLENNAN A

MARSH AND MCLENNAN AGENCY

ME

In-Force revenue of \$14,529

Retirement Service Providers

510 MAIN STREET STOP A THE PENSION SERVICE INC.

> **GORHAM** ME 04038

In-Force revenue of \$5,697 **MORNINSTAR**

Advisers

PO BOX 990067 VOYA RETIREMENT INSURANCE AND ANNUI

HARTFORD Participant Payments CT 061991268



Accounting Firms

BAKER NEWMAND AND NOYES

BAKER NEWMAND AND NOYES

CONTACTS

Kristy Greco Form 5500 Signatory	PROJECT INSPIRE, INC. DBA RAREBREED VETERINARY P PORTLAND - ME	(207) 333-7580
Joshua Casavilca-Serrano Form 5500 Signatory	RAREBREED VETERINARY PARTNERS PORTLAND - ME	
Gary Dattner Co-Owner	CAT DOCTOR NEW HYDE PARK - NY	(516) 500-7407