

History

Experienced, Trusted, Committed

For over 70 years, Ascension companies Pan American and Walter L. Clark's depth of experience has made us the partner of choice across a wide range of industries.

We work extensively with companies in California and Arizona to service their Workers' Compensation needs. We'll listen carefully and help you design programs tailored specifically to your location, product and employees. We'll work hard to find solutions that create safer and more productive workplaces, more confident and secure workers, and overall savings that you'll see in your bottom line.



Locations

Corporate Headquarters

1277 Treat Blvd, Suite 400
Walnut Creek, CA 94597

2680 E. 24th Street
Yuma, AZ 85365
(928) 726-9620

7673 N. Ingram
Suite 103
Fresno, CA 93711
(800) 303-8272

77-851 Las Montanas Rd
Suite B
Palm Desert, CA 92211
(760) 772-1700

1610 Arden Way
Suite 121
Sacramento, CA 95815
(916) 286-5960

80 S. Lake Ave
Suite 600
Pasadena, CA 91101
(626) 844-7100

2800 West March Ln
Suite 420
Stockton, CA 95219
(209) 955-2600

201 Monterey-Salinas Hwy
Suite G
Salinas, CA 93908
(831) 455-9515

2529 Professional Pkwy
Suite A
Santa Maria, CA 93455
(805) 938-1575

484 N. Prospect St
Suite A
Porterville, CA 93257
(800) 457-9362

1004 West Main St
Suite B
Visalia, CA 93291
(559) 733-3758

Ascension Insurance Services, Inc.
Walter L. Clark & Associates, Inc.



Pan American | Walter L. Clark

Workers' Compensation and Claims Services



Experienced
Trusted
Committed

Claims Services

Our claims team can customize a service and training plan that fits your needs. All of the following claims services can be provided on-site or in a classroom setting at no additional cost.

Workers' Compensation Claims Services

- Claims Reviews
- Reserve Analysis
- Pre and Post Unit Stat Reviews
- Experience Modification Reviews
- Injury Trends
- Body Part Analysis
- Day of the Week Trends
- Frequency Analysis
- Severity Analysis
- Nature and Causes of Injuries Analysis

Property Casualty Claims Services

- Submits ACORD Claim form to appropriate carrier within timelines
- Continually updates Agency Management Systems on all claim activity until claim is closed
- Coordinates communications between carrier and client (act as liaison)*
- Documents and closes out computer file when claim is concluded
- Ensures the delivery of quality claims service to clients; providing answers to customer questions
- Responsible for maintaining and developing insurance carrier relationships

Why Ascension?

As a business owner, the safety and productivity of your workforce is a top priority. Injuries in the workplace demand prompt attention and proper handling to ensure appropriate medical care and timely return to work. When you become our client, we don't just sell you an insurance policy, we partner with you, and together we'll work to achieve measurable results.

In addition to having extensive claim experience, our claims team has an average of 19 years of industry experience. We work closely with our carrier partners and we stay up to date with the ever changing laws and workers' compensation regulations that impact your business.

*As permitted by applicable carrier agreements

Workers' Compensation and Claims Consultants



Joe Dunn, CPDM, CCMP Claims Services Manager

Joe has been involved in workers' compensation since 2001 in the capacities of claims adjuster, senior claims adjuster, hearing representative, vice president

of workers' compensation claims, senior claims management consultant and is now the Claims Services Manager. Joe is responsible for our clients workers' compensation claims advocacy. He works closely with our clients and insurance carriers to reduce overall claims costs, claim frequency and to close claims as quickly as possible. Joe also has a Certified Professional Disability Management (CPDM) designation and Certified Case Management Professional (CCMP) designation, these set him apart from the other peers in the industry. These designations bring a new perspective to the claims management process to ensure claims are handled in the most efficient and cost effective manner. Joe has extensive knowledge in investigations, reviews, injury management, defense strategies, reserve analysis, Unit Statistical Filing reviews and experience modification projections.

✉ jdunn@ascensionins.com

☎ (559) 492-5392



Dennis Yee Property & Casualty Claims Specialist

Dennis has worked in the property & casualty claims management space since 1985. He brings a wealth of knowledge

& experience to our clients when they need it most—at the time of claim. Having worked in the claims departments of several major carriers during his career, Dennis understands what goes on behind the scenes with insurance companies and is excellent at interfacing with adjusters and claimants alike. We're sure you'll be glad to have Dennis on your team—his analytical, communication, investigative and interpretive skills are top tier in the industry.

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☎ (916) 286-5987



Christina Gomez, CPDM Senior Claim Management Consultant

Christina has been in workers' compensation, since 2001. Christina was a claims technician, adjuster, senior adjuster and

is now a Senior Claims Management Consultant. She is making a difference by assisting and educating employers with managing their workers' compensation claims. Her services include claims management to prevent injuries and aid employers to cost-effectively manage any claims that occur. Other responsibilities include analysis of loss data, experience rating forms, claim status reports to determine claim closure action plans/service schedules, daily interaction with claim examiners and employers to educate them how to navigate and manage the complex workers' compensation system. In addition, she has the organizational ability to set and adhere to tight deadlines, following up on activities that achieve the desired results. She obtained her Certified Professional Disability Management (CPDM) designation in 2015. This designation brings additional knowledge to the claims management process to ensure claims are handled in the most efficient and cost effective manner.

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☎ (559) 691-4192



Pete Montalvo Claims Management Consultant

Pete has been involved in California workers' compensation since 2004 in the capacity of adjuster and

senior adjuster. During this time, Pete has had the pleasure of working alongside California employers to proactively manage and resolve an inventory of indemnity claims. Pete efficiently manages claims from the initial liability determination through finalization while maintaining excellent working relationships with injured workers, employers, attorneys and the medical community.

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Phyllis L. Moretti Senior Claim Management Consultant

Phyllis has been in the claims industry since 1981, starting her career at Scott Wetzel

Services as a claims adjuster. She spent over 9 years as an Auto/General Liability Adjuster and Workers' Compensation Examiner. She then spent 9+ years at Kemper Insurance working her way up to a Team Manager, supervising 12 people. At Kemper, she developed expertise in Auto/General Liability, Property, Construction Defect, Pharmaceutical and Workers' Compensation claims. She was also an Inter-Company Arbitrator. Following Kemper, Phyllis was a Western Account Executive at Atlantic Mutual and then spent over 8 years at Willis as an Assistant Vice President/Sr. Workers' Compensation Consultant. She has spent most of the last 12 years focusing on workers' compensation.

Her industry experience and specialization includes servicing high technology, manufacturing, supermarkets, hospitality, the arts, non-profits, waste management, agriculture and educational clients. She has worked with extremely large national accounts as well as privately owned, smaller companies. Specific areas of expertise include individual and formal workers' compensation training, physical audits of claim files, claim review and reserve analysis, loss trends, litigation and medical management.

Phyllis attended the College of Morris in New Jersey. She has completed various workers' compensation courses through the CA Insurance Education Association. Phyllis continues to attend legal seminars and subscribes to several industry publications in order to be kept up to date with the constant changes in workers' compensation.

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State Licenses:

WLC 0269158
PAN AM CA OF89850
PAN AM AZ 912733