



**Advantage Dealer Insurance Agency**  
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Offered exclusively thru ADI:



## who we are...

*ADI Agency programs are structured to return more profit than any other company in the industry.*

**Innovators.** A group of professionals who got tired of insurance being considered a four-letter word. A group of insurance professionals who have figured out a way to bring what we know, and what we've done, to the market in an entirely new way. A way that benefits lenders, manufacturers, dealers, and their customers... not just the insurance company.

At ADI Agency we show our dealer clients how they will directly benefit from the sale and revenue of insurance products. Then we take it several steps further. By tapping into not just our insurance backgrounds, but also our vast experience in the construction equipment business, we're able to understand your concerns, speak your language, and offer custom-tailored products that will enhance your customer relationships and your bottom line.

Our managing partners each bring a unique talent to the table, as you can see in our bios below. This dynamic combination has enabled us to develop and introduce some incredibly creative tools, that will open your business to more opportunities, added growth, enhanced customer satisfaction and of course, higher profits.

ADI Agency is both an insurance agency and consulting group. The focus of the company is to help dealers and manufacturers utilize finance and insurance programs that will help boost their core business; SELLING MORE EQUIPMENT! ADI has developed a variety of unique new programs for lenders, manufacturers and dealers including; insurance programs that dealers can offer their customers directly, comprehensive self-branded extended service contracts, a turn-key customer reward program, and a hassle-free rental fleet insurance program that opens up new markets for dealerships that rent.

**Christine Tracey** has extensive knowledge of the construction equipment industry, having grown up in a family-owned dealership. In addition, she has a strong background in the financial services industry. She started her career with AG Edwards & Sons in Boston after receiving her MBA from Drexel University. Christine is fully licensed with her series 7, 66, life, accident, health, property and casualty brokerage licenses. In 2004 she and Raj Julka joined talents to start The Tracey Agency to service the customers of Tracey Road Equipment and help them meet their insurance and financial service needs. Christine's extensive knowledge of insurance combined with decades of involvement with dealership operations makes her a well rounded member of the ADI team.

**Raj Julka** began working at the Tracey Road Equipment dealership at the age of 17. His work for the dealership in the accounting department led him into the field of insurance and financial service after graduating from college. Raj is fully licensed with series 7, 6, 66, 63, life, accident, health, property and casualty brokerage licenses. As Vice Presidents of The Tracey Agency both Raj and Christine have created a company that has helped dealerships provide better insurance and financial services for their customers. With his background in insurance and financial services and an enthusiastic entrepreneurial spirit, Raj is helping ADI grow into a leading service provider to the industry.



**Lisa Weatherall**, serving as Director of Business Development, has garnered diverse executive experience within leading financial services lending arenas, working with both Citigroup and GE Capital. Her focus has been on the construction equipment industry while serving as National Accounts Manager, tasked with growing sales of dealerships, manufacturers, rental companies, and auction houses through creative financing. Her specialty is concentrating on clients to grow revenues, capture higher customer satisfaction from their existing customer base, and opening new markets. She introduced ADI's program into Citigroup generating an additional revenue stream. Lisa received her MBA from Texas A&M University and holds her property and casualty brokerage license.

learn more at...

[www.adiagency.com](http://www.adiagency.com)