

Case study: Promoting scale with strategic solutions

For eligible and qualifying customers. When a growing insurance consulting firm was struggling to secure a credit line increase, they needed more than a financial advisor – they needed a trusted advocate who could help **navigate underwriting requirements** as the firm prepared to scale. Our underwriting considers a range of factors to evaluate your company's financial performance and commercial credit history.

Support from American Express Account Executives is only available to eligible American Express Corporate Program customers with annual spend of greater than \$1M. Other eligibility factors, such as account standing, may apply. Eligibility criteria are subject to change without notice.

HOW AMERICAN EXPRESS HELPED



Dedicated support

The Account Executive served as a single, trusted point of contact, helping simplify complex discussions and guide stakeholders through critical decisions.



Reduced complexity

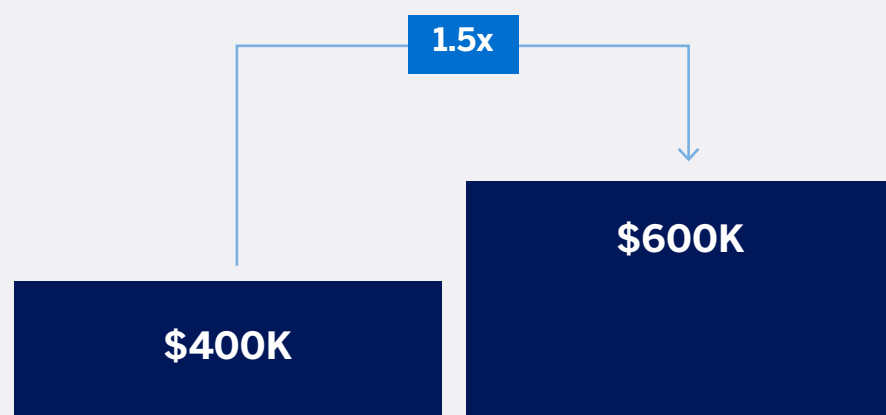
Working closely with sales, underwriting and advisory teams, the Account Executive showed up for the customer, providing advocacy and actionable guidance during the credit review process to help secure the requested increase.



Scalable solutions

By understanding the company's financial objectives and future plans, the Account Executive was able to increase credit access to provide flexibility and enable the firm to grow with confidence. Ask to connect with our underwriting specialists who will assess your business's financial performance and guide you through the process.

American Express helped secure a credit line increase



THE RESULT

With dedicated support and clear guidance, the customer benefitted from:

- ✓ **Improved clarity** throughout a complex underwriting process
- ✓ **Stronger alignment** across customer and internal stakeholders
- ✓ **Reduced operational friction** through structured collaboration
- ✓ **Assistance in managing** future growth opportunities
- ✓ **Ongoing backing** from dedicated American Express experts

THE POWERFUL BACKING OF AMERICAN EXPRESS

American Express believes in what businesses can achieve. We combine relationship-driven services with financial expertise to help our customers navigate complex challenges, build staying power and pursue growth with confidence.



“I kind of consider myself the quarterback of the account. Sure, I'll have to bring in other players, but I'm on every call, I'm always available and I'm directing everything. I want the client to feel like I'm the single point of contact.”

– Julie M.
Account Executive, American Express

Interested in learning more?

[Explore more stories](#)

This use case is specific to this customer's individual experience. Other customer outcomes may differ based on their specific needs and how they use their American Express Corporate Program. Depending on the product and integration, terms and fees may apply, and additional customer resources may be required for implementation. This material contains information that is proprietary and confidential to American Express. It cannot be shared with third parties without American Express' written consent. AMERICAN EXPRESS PROPRIETARY & CONFIDENTIAL. DO NOT COPY. DO NOT DISTRIBUTE.

