



# Introduction to Lab References Advisory Group

## PROVE OUR VALUE (POV) LETTER: A DISABLED VETERAN BUSINESS SERVING YOU!

Please take a moment to review our capability statement. I am a certified minority SDVOB, Managing Agent for 40+ years, and IMO that provides retirement and voluntary benefits plans for owners of small businesses and high net worth individuals. *Connect on LinkedIn:* <https://www.linkedin.com/in/felton3/>

In 2020, we have added several new high value capabilities to our service portfolio:

1. **UP to 6:1 leverage strategy (KAIZEN).** Tax free retirement, accumulation, living and death benefits
2. **Insurance Billing, Claim and Revenue Recovery (A/R)** services for all physician specialties
3. **Secure Access to Capital Funding** for our fellow VOB, SDVOB, and Minority Supplier connections
4. **Medical Cost Sharing and Cost Certainty Dental Plans** available for employers and employees

*Why partner with [www.labreferences.com](http://www.labreferences.com), a SDVOB. We Will Prove our Value:*

- **Significant business impact with sustainable value:** We deliver significant value to our sponsors and stakeholders. Sustainable means we generate tangible cost savings over a multi-year period
- **Broad and deep initiatives:** Broad to us means “several” and deep signals “significant” initiatives within the alliance or partnership that cut across the value chain of both our companies
- **Strong organization commitment:** Our commitment flows down from our CEO down and will be marked by clear ownership at a senior level and by our account alliance and management team
- **Substantial investment by both companies:** Investment can be people, capital, intellectual property, or all three.
- **Strategic alignment and fit:** Our companies’ strategies in the target space must be well aligned

I hope you find that our unique financial value prop resonates with your values and your interests.

- *May I schedule a 30 min call with you to review how we may be of service to your company?*

Thank you for your time reviewing our capability statement. The best to you, each and every day.

Regards,

Felton E. Lewis III

fel 3 | founder, President/CEO | e: [fel3@labreferences.com](mailto:fel3@labreferences.com) | M: 269-209-1217 | O: 877-445-6151





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**THANK YOU TO** Disability: IN, NaVOBA, NVBDC, and NMSDC and our **CORPORATE PARTNERS FOR ENGAGING WITH SDVOB AND VOB**

## OUR BUYERS BRIEF & CAPABILITY STATEMENT

SDVOB Established in 1976  
Cage Code: 7L1P1  
NVBDC and VA SDVOB Certified since 2016

**EMPLOYEE BENEFITS | MEDICAL BILLING & REVENUE RECOVERY | FUNDING**

- 522310 - Capital Funding, Non-Mortgage Loan Brokers
- 524114 - Direct Health and Dental and Medical Insurance Carriers
- 524210 - Insurance Agencies and Brokerages
- 525120 - Plans, Health and Welfare-related Employee Benefit
- 541612 - Human Resources and Benefits Consulting Services
- 561110 - Medical Billing
- 621511 - Medical Laboratory
- 621610 - Home Health Care Services



● **LAB REFERENCES ADVISORY GROUP** ●

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



International Small Business Association

[www.internationalsba.org](http://www.internationalsba.org)



## Introduction to Lab References Advisory Group

**CAPABILITY STATEMENT** Prepared by: *Felton E. Lewis III* A minority owned certified SDVOB serving SMB, Contractors (1099), HBCU's, Associations, and our Corporate Partners who value diversity.

- **Our founder, Felton E. Lewis III** (legacy Air Force & National Guard) has 40+ years of experience in the Employee Benefits Management/Administrator space and healthcare insurance industry as a Managing Agent and IMO. Felton founded a non-profit [www.internationalsba.org](http://www.internationalsba.org) to provide tax free retirement strategies for business owners and high net worth individuals, as well as, voluntary benefits for independent contractors and small businesses. He has led the program design of Life, Health, Dental, Vision, Legal, and Retirement Benefits. [www.labreferences.com](http://www.labreferences.com) is a Strategic Partner for PlanSURITY, and several national insurance carriers, and medical plans.
- **Our SVP of Supplier Engagement, Brenda Smith** (legacy US ARMY & Reserve) has 30+ years in Supplier Diversity Management, Diversity and Inclusion, and creating Strategic Diversity Programs for Nike, Intel, and Veteran Business Development organizations. Brenda engages directly with Supplier Diversity, Employee Benefits, and Member Benefits Execs to build win/win partnerships.

### Our Engagement Charter:

- a) always serve and identify business value, risk, and cost saving opportunities for our clients
- b) build relationships and maintain our personal business commitment to our clients
- c) champion our client's diversity goals and ensure our relationship is referenceable

### Our Product, Advisory and Consulting Service Portfolio includes:

- **Premium Bank Financing | Tax Free Retirement, Accumulation and Death Benefit Programs**
  - <https://vimeo.com/298671846>
- **Secure Access to Capital | We assist VOB, SDVOB, Startups and SMB secure funding**
  - <http://www.labreferences.com/raise-capital.html>
- **The Best Medical Cost Sharing and Dental Plans available for VOB, SDVOB, Startups and SMB**
  - Dental, Health, Life, Disability, Vision, Legal Protection and 401K
  - <https://www.wowhealthsolutions.com/employer/>
- **Revenue Recovery and Reduce OPEX | We provide a free look back analysis**
  - <https://vimeo.com/user49365795/review/333812168/15ca46797c>



# Introduction to Lab References Advisory Group



## OUR CERTIFICATIONS



CERTIFICATE No. 01017

National Veteran Business Development Council

## CERTIFICATION

is hereby granted to:

**Ams/Bfma LLC (DBA: Lab References Advisory Group)**

The National Veteran Business Development Council certifies that the named entity has met all criteria established to be recognized as a Service Disabled Veteran Owned Business (SDVOB)

Given this Date: 10/29/2019  
Expiration Date: 10/29/2020

President, Keith King



**DEPARTMENT OF VETERANS AFFAIRS**  
Center for Verification and Evaluation  
Washington DC 20420

June 22, 2016  
In Reply Refer To: 00VE

Mr. Felton Edwin Lewis, III  
Ams/Bfma LLC  
DBA: Lab References Advisory Group  
DUNS: 126203889

Dear Mr. Lewis:

On behalf of the U.S. Department of Veterans Affairs (VA), Center for Verification and Evaluation (CVE), I am writing to inform you that Ams/Bfma LLC DBA: Lab References Advisory Group (Ams/Bfma LLC) has been verified as a Service-Disabled Veteran-Owned Small Business (SDVOSB) and added to the Vendor Information Pages (VIP) at <http://www.vip.vetbiz.gov>. Ams/Bfma LLC will be eligible to participate in Veterans First Contracting Program opportunities with VA.