



Portfolio Guide

Q3 | 2024

SPG Rankings

Latest 2024 Business Insurance Wholesale/MGA rankings! The hard work and dedication of SPG and its portfolio of brands has reflected in last year's results as we continue to climb up the ranks!

BI

BUSINESS INSURANCE®



#7 in 2024

Specialty Intermediaries



#6 in 2024

Property/Casualty Wholesaler



#5 in 2024

Multiline Wholesaler



#5 in 2024

Underwriting Manager

Coverholder at **LLOYD'S**

Table of Contents

[Who We Are](#)

page 2

[SPG By the Numbers](#)

page 3

[SPG Divisions](#)

page 4

[Underwriting and Wholesale](#)

pages 5 - 7

[Resources to Scale Your Business](#)

page 8

[Accessing our Leadership and Capabilities](#)

pages 9 - 10

[Our Portfolio of Companies](#)

pages 11 - 16

Helping industry leading
specialty business **grow.**

Who We Are

Founded in 2015 with the singular purpose of building a world-class specialty insurance intermediary by acquiring best-in-class underwriting and niche businesses and providing the resources they needed to grow.

In just a few years, we have grown to a portfolio of 30 companies, managing \$5BN GWP, with organic growth of over 10% since our founding and 1100+ employees in over 35 offices across the United States.

The core values of SPG include integrity, teamwork, accountability, and service underpinned by an entrepreneurial spirit and people-first culture.

We are growing our position in nearly every specialty market and have expanded our platform beyond P&C Wholesale Brokerage and Underwriting to include Digital, Life & Health, Specialty Retail & Service companies.

We are..

1

A **major force** in:

- Specialty insurance broking
- Underwriting
- Consulting Facilities

2

A **leading MGA and Wholesaler** in the U.S.

3

At the forefront of **digital distribution**.

4

A **proven acquirer** that **helps our partners grow**.

SPG By The Numbers



6

Divisions



\$5B

Premium



1100+

Employees



30

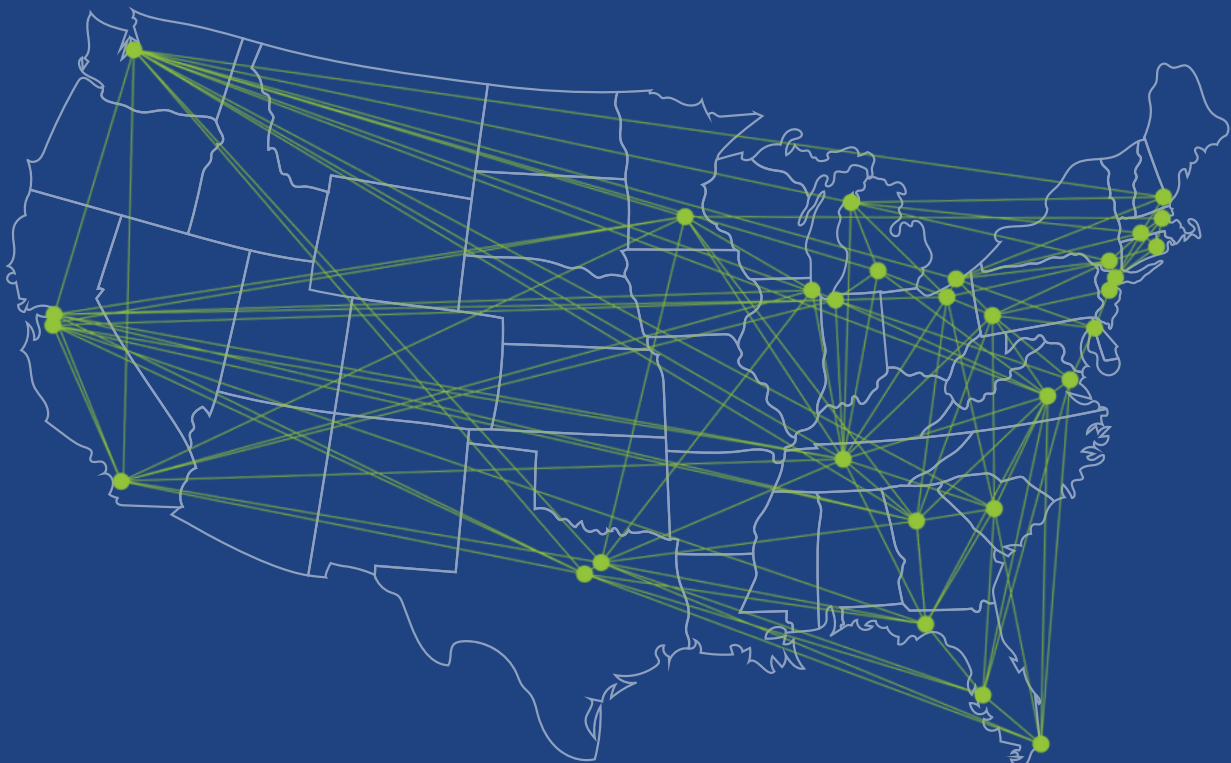
Portfolio
Companies



40+

Locations

Our Footprint



SPG Divisions



Underwriting

As of 2024 year-end, we manage ~ \$1.5B of premium on behalf of our capacity partners, achieving an industry-leading 59.3% ultimate loss ratio across the portfolio. We anchor ourselves in being the **best-in-class** stewards of our partner's capital, and that value proposition is **core underwriting execution and discipline**.

Precision. Expertise. Commitment.

Specialized Underwriting Businesses

Specialized underwriting businesses with **deep industry knowledge** of their market niche deliver proven underwriting results. We take pride in leading our businesses with the same rigor and discipline as a carrier.

Bespoke Distribution

We believe in distribution that makes sense for the product and the culture of the niche segment. Whether this is digitally direct to consumers, through wholesalers, retailers, or strategic partnerships, our distribution is **thoughtfully curated through key relationships**.

Leading Product Development

Our product development team **works closely with our experts** to anticipate emerging market opportunities and build thoughtful, quality submissions through a rigorous development process that ensures we are bringing strong new opportunities to the marketplace.

Alignment of Interest

We believe in **aligning our compensation plans** throughout the organization with our carrier's profitability.

Actuarial, Data Analytics and Claims Capabilities

Our team consists of proven, **experienced industry specialist** who provide the underwriting teams with clear and consistent insights into their underwriting results, enabling us to **execute with discipline and rigor**. We are proactive in our actuarial disciplines, allowing us to be proactive underwriters. Our claims leaders complement our claims administrators with technical expertise and claim oversight to ensure claims excellence and high customer satisfaction.

Entrepreneurial Spirit

Last but certainly not least, we provide our operators the breathing room to run their business in ways that work for them and provide resources to make their goals into reality. **This is our culture**.

Wholesale

SPG's wholesale brands are some of the most well-known specialty wholesale brokers in the business and core to our culture. As of year end 2023, we manage ~ \$5B of premium which independently would make the group a top 5 wholesale brokerage operation in the US. We anchor ourselves in being the best in class relationship managers and that value proposition is core to our mission and vision.

Our relationships are your **advantage**.

Specialized Brokering

We employ brokers that understand the E&S marketplace in their niche and that **live and breathe** their segment.

Alignment of Interest

We believe in aligning our relationships to **mutually beneficial outcomes** for both our agents and carrier partners. If that alignment can't be found, we decline.

Bespoke & Trusted Distribution

We believe in distribution that make sense for the product and the culture of the niche segment. Our retail distribution is **thoughtfully curated through key relationships** anchored in trust.

Specialization

Our leadership team and brokers consist of **specialized expertise** in the areas of Construction, Professional, Environmental, Flood, & Contract Binding with the largest domestic markets and Lloyds syndicates.

Entrepreneurial Spirit

Last, but certainly not least, we provide our operators the breathing room to run their business in ways that **work for them** and provide resource to make their **goals into reality**.

Wholesale Industries We Serve



Construction



Real Estate



Healthcare



Non-Profit



Lawyers



A&E



Financial Institutions



Medical Billing



Executive &
Professional Liability



Hospitality



Cyber Liability &
Technology E&O



Complex Risks



Manufacturing



Collections



Environmental &
Pollution

Learn more by visiting to our specialty programs page on our website or scan:



Scan to Visit

Resources to Scale Your Business



Business Process & Efficiency



Sales & Marketing



Product Development



Operations & Technology



Human Resources



Finance & Accounting



Digital Strategy



Data Analytics



Underwriting



Actuarial



Legal & Compliance



Claims

Learn more by visiting to our [Resource Page](#) on our website or scan:



Accessing our Leadership & Capabilities



Chris Treanor
President and CEO

Business Planning | M&A | Culture |
Core Business Support



Maryellen Dolan
Chief Operations Officer

Technology | Business Process | Compliance | Claims |
Contract Administration | Culture



Ryan Barnes
Chief Finance Officer

Financial Planning & Analysis | Accounting Services &
Special Projects | M&A Selection | Culture



Jonah Lipin
Chief Marketing Officer

Program Submission Building | Connectivity to Program
Marketplace | Culture



Chris Lamitola
Chief Sales Officer

Distribution & Cross-Sell | Sales Strategy & Planning |
Sales Analytics & Resources | Producer Recruiting &
Development | Culture



Matt Pinkham
Chief Legal Officer

Contract Review & Support | Regulatory Compliance |
General Legal Consulting | Claims | M&A | Culture



Dennis Kane
EVP Director of Program
Underwriting

Underwriting Governance | M&A | Culture | Underwriting
Business Support



Danny Fogel
Vice President of
Mergers & Acquisitions

Planning Process | M&A | Special Projects | Core Business Support | Culture



Brandon Heutmaker
Vice President and Actuary

Actuarial Planning Analysis | Special Projects | Culture | Underwriting Profitability Support



Emily Landa
Vice President,
Human Resources

Talent Management / Recruiting | Performance Management | Training Opportunities | Culture



Eli Orozco
Vice President,
Marketing

Branding | Marketing Strategy | Digital Marketing | Analytics | Culture PR & Communications



Curtis Johnson
Senior Vice President
of Claims

Strategic Claims Management | Process Optimization | Operational Efficiency | Culture



Elizabeth Thimme
VP Digital Strategy &
Implementation

Digital Transformation | Strategic IT Projects | Core Business Digital Strategy | Cross Platform Integrations | Culture



Jennifer Spindler
Chief Product Officer

Special Projects | Program Submission Building | Business Support | Culture

To view the bio of our leadership team go to our [Leadership Page](#) or scan:



Our Portfolio of Companies



**SPECIALTY WHOLESALE
INSURANCE SOLUTIONS™**
Division of Specialty Program Group, LLC

WHOLESALE BROKERAGE

E&S Wholesale & Specialty

- General Wholesale
- Construction
- General Liability
- Excess
- Property
- Builders Risk
- Professional Liability
- Management Liability
- Cyber

Cindy O'Brien, President

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**NATIONAL
ELEVATOR**
INSURANCE SOLUTIONS™

UNDERWRITING
MANAGEMENT

Elevator Maintenance Contractors

- General Liability
- Workers Compensation
- Excess Liability
- Professional Liability
- Auto
- Bonds
- Property

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**SPECIALTY
CAPTIVE GROUP™**
Division of Specialty Program Group, LLC

CAPTIVE WHOLESALE
BROKERAGE

Captive

- Alternative Risk Financing
- Captive Management
- Captive Consulting
- Program Administrator
- Enterprise Risk Management
- Workers Comp
- Auto Liability
- General/Products Liability
- Professional Liability
- Property

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John Yaple, VP

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GLOBAL MARINE
INSURANCE AGENCY™
Division of Specialty Program Group, LLC

SPECIALTY BROKERAGE

Recreational Marine

- Boats
- Yachts
- Mega Yachts
- Recreational Vehicles
- Commercial Marine

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**SPECIALTY COMP
INSURANCE SOLUTIONS™**
Division of Specialty Program Group, LLC

UNDERWRITING
MANAGEMENT

Workers Compensation

- Transportation
- Manufacturing
- Healthcare
- Waste Service
- Hospitality
- Specialty Staffing
- Construction
- Tough to Place

Steve Math, President & CEO

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PAUL HANSON PARTNERS™
Division of Specialty Program Group, LLC

UNDERWRITING
MANAGEMENT



UNDERWRITING
MANAGEMENT

Transportation

- Moving and Storage
- 3PL Warehouse Program
- Last Mile Logistics
- Middle Mile Logistics
- Independent Contractor

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Renee Paul, Vice President
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Paul Hanson Partners



BIZCHOICE



MOVER'S CHOICE



CONTRACT BINDING &
WHOLESALE BROKERAGE

Commonwealth Underwriters
A Division Of Specialty Program Group, LLC

CONTRACT BINDING &
WHOLESALE BROKERAGE

E&S, Wholesale & Binding

- General Liability
- Property
- Package
- Inland Marine
- Excess
- Garage
- Environmental
- Homeowners/Dwellings
- Farm & Ranch
- Liquor Liability
- Flood
- Personal Umbrellas/CPL
- Personal Article Floaters

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Monarch



CommonWealth



WHOLESALE BROKERAGE



UNDERWRITING
MANAGEMENT



WHOLESALE BROKEAGE

Professional Management Liability

- E&O
- Cyber
- Privacy & Network Security
- K&R
- D&O
- EPLI
- Fiduciary
- Crime
- Healthcare Professional

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CSRisks



Keystroke



CLEAR MARINE
RISK SOLUTIONS
Division of Specialty Program Group

UNDERWRITING
MANAGEMENT

Commercial Marine

- Marinas
- Boat Dealers
- Yacht Clubs
- Boat Rentals
- Sailing Schools
- Dock & Piers

John Logothetis, President
231.932.4099

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Cranes

- Crane Rentals
- Millwright and Steel Erection
- Monoline Riggers Program

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Niche Programs

- MediSpas & Day Spas
- CBD/Hemp Facilities
- Tattoo & Body Piercings
- Permanent Cosmetics
- Beauty Salons
- Smoke Shops
- Pyrotechnics
- Product Liability

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Security

- Security Guards
- Alarms
- Private Investigators

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Steve Mechanic, Principal
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Stop Loss Insurance

- Stop-Loss Insurance Services Tools
- Self-Funded Health Plan Consulting
- Alternative Risk Transfer Solutions

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Chuck Haynie, COO
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Underwriting

- Moving & Storage
- Occupational Accident
- Leased Owner/Operator

Scott Hendricks, CEO
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Tim Clinton, President
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avantunderwriters.com



Commercial Transportation & Wholesale Brokerage

- Independent Contractors
- Fleets
- Motor Carriers
- FedEx Program
- Amazon Middle Mile Program
- Customized Administrative Solutions

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avantclaims.com





SERVICES

Claims Service Provider

- Commercial Transportation Basic to Unique Coverages
- Cannabis Seed to Sale
- Supermarkets
- Moving & Storage
- Non-Trucking Liability
- Occupational Accident / TX Non-Subscriber
- Product Liability
- General Liability
- Property
- Business Interruption
- Professional Liability
- Cargo
- Warehouse Legal
- First Party & Third Party Claims
- Catastrophic Claims
- Coverage Analysis
- Mediation / Arbitration / Litigation
- Fast Trucks Repair Shop Program
- Avant Cares Occupational Accident Program
- Coverage Analysis
- Recovery: Subrogation & Salvage

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UNDERWRITING MANAGEMENT

Supermarkets

- Independently Owned Retail Supermarket/ Grocery Stores
- Ancillary Operations of Supermarket Operations:
 - Offices
 - Warehouses
 - Hardware
 - Restaurants
 - Convenience Stores

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UNDERWRITING MANAGEMENT

Cannabis

- Manufacturers
- Transporters
- Laboratories
- Processors
- Wholesalers
- Dispensaries
- Property Owners
- Cultivators

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BEACON™



HILL ASSOCIATES
Division of Specialty Program Group, LLC

WHOLESALE BROKERAGE

Pollution & Environmental

- Contractors Pollution & Professional Liability
- Packaged Insurance for Environmental
- Contractors, Consultants and Facilities
- General Liabilities & Products Pollution
- Coverage for Manufacturers & Distributors
- Energy-Related Coverage & Enhanced Fuel Solutions
- Over The Road Pollution / Transportation
- Pollution Liability
- Auto, Including Pollution
- Excess Insurance Coverage
- Storage Tank Coverage
- Premises Pollution Liability

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Beacon Hill



UNDERWRITING MANAGEMENT



PartnerOne



Division of Specialty Program Group, LLC

DIGITAL UNDERWRITING MANAGEMENT

Healthcare Professional Liability

- Nurse Practitioners
- Physical Assistants
- Med Spa
- IV Hydration
- Family Practice & Urgent Care
- Physical Therapy
- Mental Health Professions

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Will Sullivan, CUO
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cmfgroup.com





WHOLESALE BROKERAGE



WHOLESALE BROKERAGE



WHOLESALE BROKERAGE

Life & Financial Products

- Life, Annuities
- Long Term Care
- Advanced Markets
- Policy Reviews
- Income Maximization
- Risk Differential Underwriting
- Vive Online Terms Life Software

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BSMG

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AgencyOne



BUA



DIGITAL
SPECIALTY BROKERAGE

Small Commercial

- General Liability
- Business Policy
- Professional Liability
- E&O
- Workers' Compensation
- Cyber Liability
- Commercial Auto

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SPECIALTY BROKERAGE

Entertainment

- Entertainment, Leisure & sports facilities
- Athletic
- Event Cancellation & liability
- Prize Indemnity
- Motorsports
- Participant Accident

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ESP



SPECIALTY BROKERAGE

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JonesBirdsong



SPECIALTY UNDERWRITING
INSURANCE SOLUTIONS™

UNDERWRITING
MANAGEMENT

Excess Casualty

- Habitational Excess

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UNDERWRITING
MANAGEMENT &
WHOLESALE BROKERAGE

Home Builder & Inland Marine

- Builders Risk
- Contractors Equipment
- Home Builders Package

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UNDERWRITING
MANAGEMENT

Fiduciary Liability

- Fiduciary Liability
- D&O
- Cyber
- Management Liability
- Professional Liability/
Misc. E&O

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Travel

- Trip Cancellation & Interruption
- Emergency Medical & Medical Evacuation
- Travel Delay & Missed Connection
- Baggage Delay & Baggage Loss
- Cancel For Any Reason

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Recreational Marine

- Extended Marine Service Contracts

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Entertainment

- Archery
- Axe Throwing
- Escape Rooms
- Bowling Alleys
- And more specialty entertainment facilities

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Risk Consulting Services

- Risk Preparedness
- Emergency Response
- Insurance & FEMA Claims
- Project Management

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 Dr. Kim Abrego, PT, DPT - COO
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Sports & Entertainment

- Trade Show General Liability
- Event Cancellation Programs
- Trade Show Exhibitor Liability
- Weather Insurance & Promotions
- Prize Indemnity Insurance
- Contractual Bonus Insurance
- Over-Redemption Insurance
- Games of Chance Surety Bonds

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Sports & Recreation

- National associations
- Teams/leagues
- Camps/clinics
- Sports facilities
- Tournament/event hosts
- Amateur youth and adult
- Accident, General Liability, D&O, Crime, Equipment, etc.
- Instant online quote/pay/print
- Best in industry sports risk management

John Sadler, President
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To Learn More About SPG

Visit our website

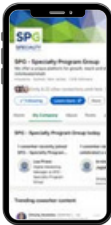
 specialtyprogramgroup.com



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SPG | **SPECIALTY**
PROGRAM GROUP