

# Insurance Brokers Report 15% Boost in OC Revenue

## Alliant, Marsh, Burnham Say 2021 Sales Boomed

■ BY PETER J. BRENNAN

Orange County's largest insurance brokers reported their revenue rose 15% in 2021 combined.

That's double the 7.1% growth in 2020 and above the 10% seen in 2019.

The biggest jump on this year's list was a 107% rise to \$78.4 million for Irvine's **Burnham Benefits Insurance Services**, which climbed six spots to the No. 3 ranking. A year ago, its parent company, **BRP Group Inc.**, acquired Tustin-based **Wood Gutmann & Bogart Insurance Services LLC**.

"Everyone is pleased with the partnership," Burnham Chief Executive **Kristen Allison** said. "From what we hear from carriers and clients, they don't feel any disruptions."

**Alliant Insurance Services Inc.** continues to top the ranking, reporting its OC revenue climbed 15% to \$235.7 million in 2021. Companywide, it's grown to more than \$3 billion in annual sales with the help of both organic growth and acquisitions.

"Our financial performance in 2021 resulted from another year of exceptional organic growth," Alliant Chief Executive **Tom Corbett** said. "In 2021, our most prominent growth areas aligned with the current high-growth market areas in the technology, biotech and service sectors. Other market areas have remained steady."

The company recently moved from New-

port Beach to new offices in Irvine.

Rounding out the top three is **Marsh Risk & Insurance Services/Mercer**, which reported a 10% increase in revenue to \$118.2 million.

### \$1.1B in Policies

The Business Journal ranked the 23 largest insurance brokers in the county with a cutoff of \$6 million in policies.

The brokers with headquarters or significant operations here combined for nearly \$1.1 billion worth of policies in 2021.

Eighteen firms reported revenue increases, including 11 that saw more than 10% growth. Only two firms reported a decline while five are Business Journal estimates.

The list also counts the number of licensed brokers, support staff and companywide offices, though those figures didn't affect rankings.

The insurance brokers reported their number of property and casualty producers in OC jumped 9.4% to 452, up from a 3.5% increase last year. They had fallen 8.8% in 2020 and 2.1% in 2019.

A significant grower was the Newport



Irvine office of Burnham, which nearly tripled its headcount last year

Beach office of San Francisco-based **EPIC Insurance Brokers & Consultants**, which more than doubled its P&C producers to 22. It ranked No. 15.

Its OC benefit producers climbed 2% to 282, versus a 12% rise last year.



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### Employment Growth

Revenue growth outpaced the still-notable increase in OC support staff, which rose 6.3% to 1,840 combined as of August.

A big gainer in staffing was Deerfield, Ill.-based **Orion Risk Management**. Employment out of the firm's Newport Beach office jumped 74% to 54.

The largest local increase in support staff was Burnham, which nearly tripled its headcount to 147.

The company is expanding its Irvine office from 21,000 square feet to 25,000 square feet and is also expanding its office in the Inland Empire and opening a new one in San Diego.

Burnham's CEO Allison noted that claims for mental health have continued to skyrocket.

Also significant, claims related to individuals that delayed ongoing treatment or avoided seeking care altogether, became more severe because of the pandemic.

"You might have conditions that would have been caught earlier. It creates a larger significant problem."

Burnham in 2020 was acquired by Tampa, Fla.-based **BRP Group Inc.** (Nasdaq: BRP), which represents over 1.2 million clients across the United States and internationally. BRP's revenue more than doubled in 2021 to \$567.3 million.

### Notables

■ Kansas City, Kan.-based **Lockton Insurance Brokers**, which has an Irvine office, said its OC revenue jumped 73% to \$20.5 million, good for the No. 16 spot.

■ San Francisco-based **Woodruff-Sawyer & Co.**, which also has an office in Irvine, reported OC revenue rose 48% to \$37 million. The company ranks No. 12.

■ The biggest revenue decline was 6.2% to \$37.6 million at Charlotte, N.C.-based **McGriff Insurance Services of Orange County**, No. 11. The company has an Irvine office. ■

## THE LIST INSURANCE BROKERS



**KRISTEN ALLISON**  
CEO and President  
Burnham Benefits Insurance Services



**BOBBI JO D. BROAD**  
Regional President, OC/IE  
EPIC Insurance Brokers & Consultants



**THOMAS W. CORBETT**  
Chairman and CEO  
Alliant Insurance Services Inc.



**RUSSELL GRAMSTAD**  
Managing Principal  
OneDigital



**STACY HUBBARD**  
Marsh & McLennan Insurance Agency LLC  
Managing Director, Orange County



























**BEN STERN**  
Senior VP  
Heffernan Insurance Brokers



# THE LIST INSURANCE BROKERS

▶ NEXT WEEK'S LISTS MBA Schools / Community Colleges

RANKED BY OC REVENUE

| Rank       | Company  | Revenue of OC offices for 12 months ended 12-31-2021                                | OC licensed P&C producers         | OC benefits with L&D license | OC support staff        | Primary industries served | Companywide offices | Top local official(s)   |   |
|------------|--|---|-----------------------------------|------------------------------|-------------------------|---------------------------|---------------------|---|---|
| Prev. Rank | Address<br>Headquarters  | Company logo  | •yearly % change                  | •yearly % change             | •yearly % change        |                           |                     | •Title<br>•Phone/fax  |   |
| 1          | <b>Alliant Insurance Services Inc.</b><br>18100 Von Karman Ave., 10th floor<br>Irvine 92612-0169<br>Irvine<br>Website: alliant.com<br>Email: marcomm@alliant.com                                     |    | \$235.7 million<br>15%            | 99<br>3%                     | 10<br>11%               | 421<br>-1%                | 944                 | Thomas W. Corbett/Greg Zimmer/<br>Peter Carpenter<br>chairman, CEO/president/COO<br>(949) 756-0271    |    |
| 2          | <b>Marsh Risk &amp; Insurance Services/Mercer</b><br>17901 Von Karman Ave., Ste. 1100<br>Irvine 92614-5246<br>New York<br>Website: marsh.com<br>Email: steven.k.wiens@marsh.com                      |    | \$118.2 million<br>10%            | 27<br>0%                     | 27<br>0%                | 141<br>3%                 | 425                 | Steven Wiens<br>managing director<br>(949) 399-5800   |    |
| 3          | <b>Burnham Benefits Insurance Services</b><br>2211 Michelson Drive, Ste. 1200<br>Irvine 92612-0304<br>Irvine<br>Website: burnhambenefits.com<br>Email: inquiries@burnhambenefits.com                 |   | \$78.4 million<br>107%            | 40<br>1,233%                 | 55<br>62%               | 147<br>183%               | 10                  | Kristen Allison<br>CEO/president<br>(949) 833-2983/(949) 833-9549                                     |   |
| 4          | <b>Gallagher</b><br>18201 Von Karman Ave., Ste. 200<br>Irvine 92612-1069<br>Rolling Meadows, Ill.<br>Website: ajg.com<br>Email: mary_schwartz@ajg.com  |  | \$65 million <sup>(1)</sup><br>NA | 32 <sup>(1)</sup><br>NA      | 18 <sup>(1)</sup><br>NA | 91 <sup>(1)</sup><br>NA   | 950 <sup>(1)</sup>  | Mike Bialik/Melissa Cerny/Maria King<br>area presidents<br>(949) 349-9800/(949) 349-9900              |  |
| 5          | <b>USI Insurance Services LLC</b><br>7535 Irvine Center Drive, Ste. 250<br>Irvine 92618-2966<br>Valhalla, N.Y.<br>Website: usi.com   |  | \$63.4 million<br>1%              | 11<br>0%                     | 15<br>15%               | 13<br>30%                 | 200                 | Anthony Manganello<br>executive VP/employee benefits practice leader<br>(949) 790-9200/(610) 537-2224 |  |
| 6          | <b>Marsh &amp; McLennan Insurance Agency LLC</b><br>1 Polaris Way, Ste. 300<br>Aliso Viejo 92656-5358<br>New York<br>Website: marshmma.com<br>Email: stacy.hubbard@marshmma.com                      |  | \$60.7 million<br>23%             | 17<br>6%                     | 11<br>-27%              | 148<br>6%                 | 170                 | Stacy Hubbard<br>managing director, Orange County<br>(949) 544-8460/(949) 643-3719                    |  |
| 7          | <b>Willis Towers Watson</b><br>2010 Main St., Ste. 1050<br>Irvine 92614-7261<br>London<br>Website: willistowerswatson.com<br>Email: michael.fox@willistowerswatson.com                               |  | \$55 million <sup>(1)</sup><br>NA | 10 <sup>(1)</sup><br>NA      | 1 <sup>(1)</sup><br>NA  | 40 <sup>(1)</sup><br>NA   | 427                 | Michael Fox<br>market leader, Southern California, Southwest<br>(949) 253-5200                        |  |
| 8          | <b>Brakke-Schafnitz Insurance Brokers Inc., a Signature Company</b><br>3 Polaris Way, fourth floor<br>Aliso Viejo 92656<br>Aliso Viejo<br>Website: sig.us<br>Email: matt.schafnitz@sig.us            |  | \$43 million <sup>(1)</sup><br>NA | 15 <sup>(1)</sup><br>NA      | 10 <sup>(1)</sup><br>NA | 60 <sup>(1)</sup><br>NA   | 2                   | Matthew Schafnitz<br>CEO<br>(800) 464-3606  |  |
| 9          | <b>HUB International Insurance Services Inc.</b><br>4695 MacArthur Court, Ste. 600<br>Newport Beach 92660-1861<br>Chicago<br>Website: hubinternational.com<br>Email: ann.wilson@hubinternational.com |  | \$40 million<br>18%               | 22<br>-33%                   | 12<br>-61%              | 85<br>-30%                | 530                 | Ann Wilson<br>employee benefits practice leader<br>(949) 208-9593/(949) 891-0407                      |  |
| 10         | <b>OneDigital</b><br>7755 Irvine Center Drive, Ste. 500<br>Irvine 92618-2903<br>Atlanta<br>Website: onedigital.com<br>Email: rgramstad@onedigital.com  |  | \$37.9 million<br>18%             | 0<br>NA                      | 30<br>15%               | 126<br>2%                 | 200                 | Russell Gramstad<br>managing principal<br>(949) 786-4015  |  |
| 11         | <b>McGriff Insurance Services of Orange County</b><br>130 Theory, Ste. 200<br>Irvine 92617-3065<br>Charlotte, N.C.<br>Website: mcgriff.com<br>Email: mruss@mcgriff.com                               |  | \$37.6 million<br>-6%             | 13<br>30%                    | 11<br>22%               | 130<br>20%                | 133                 | Mark Russ<br>California property & causality practice leader<br>(714) 941-2801                        |  |
| 12         | <b>Woodruff-Sawyer &amp; Co.</b><br>2 Park Plaza, Ste. 500<br>Irvine 92614-2565<br>San Francisco<br>Website: woodruff-sawyer.com<br>Email: jfuhrman@woodruff-sawyer.com                              |  | \$37 million<br>48%               | 8<br>-11%                    | 2<br>-60%               | 79<br>5%                  | 15                  | John Fuhrman<br>Southern California practice leader, management liability<br>(949) 435-7340           |  |

Abbreviations: NA: not applicable; NR: not ranked  
Note: To the best of our knowledge, this information is accurate as of press time. While every effort is made to ensure the accuracy and thoroughness of the list, omissions and typographical errors sometimes occur. Unless otherwise noted, the information on this list was provided by the companies themselves. List may not be reprinted without permission of the editor. Photos show the first top official listed.  
<sup>(1)</sup> Business Journal estimate

Researched by Meghan Kliever

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# THE LIST INSURANCE BROKERS

▶ NEXT WEEK'S LISTS *MBA Schools / Community Colleges*

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RANKED BY OC REVENUE

| Rank       | Company   | Revenue of OC offices for 12 months ended 12-31-2021 | OC licensed P&C producers | OC benefits producers with L&D license | OC support staff | Primary industries served   | Companywide offices | Top local official(s)   |
|------------|---|--|---------------------------|--|------------------|---|---------------------|---|
| Prev. Rank | •Address<br>•Headquarters   | •yearly % change                                     | •yearly % change          | •yearly % change                       | •yearly % change |   |                     | •Title<br>•Phone/fax  |
| 13<br>(11) | <b>SullivanCurtisMonroe Insurance Services LLC</b><br>1920 Main St., Ste. 600<br>Irvine 92614-7226<br>Irvine<br>Website: <a href="http://sullivancurtisonroe.com">sullivancurtisonroe.com</a><br>Email: <a href="mailto:information@sullicurt.com">information@sullicurt.com</a>        | \$35 million<br>0%                                   | 36<br>16%                 | 31<br>15%                              | 90<br>11%        | Real estate, manufacturing, food, construction, healthcare, auto dealers  | 4                   | John Monroe<br>CEO/president<br>(949) 250-7172/(949) 852-9768   |
|            |    |  |                           |  |                  |   |                     |                                  |
| 14<br>(15) | <b>Colony West</b><br>3843 S. Bristol St., Ste. 606<br>Santa Ana 92704-7426<br>Santa Ana<br>Website: <a href="http://colony-west.com">colony-west.com</a><br>Email: <a href="mailto:info@colony-west.com">info@colony-west.com</a>  | \$22 million<br>10%                                  | 20<br>-13%                | 6<br>100%                              | 5<br>-85%        | Retail, wholesale, manufacturing, life sciences, hospitality, healthcare, automotive, construction, nonprofit and social service                                  | 1                   | William F. Kaley<br>CEO<br>(877) 542-4870   |
|            |    |  |                           |  |                  |   |                     |                                  |
| 15<br>(14) | <b>EPIC Insurance Brokers &amp; Consultants</b><br>3620 Birch St.<br>Newport Beach 92660-2624<br>San Francisco<br>Website: <a href="http://epicbrokers.com">epicbrokers.com</a><br>Email: <a href="mailto:bobbijo.denofa@epicbrokers.com">bobbijo.denofa@epicbrokers.com</a>            | \$21.1 million<br>2%                                 | 22<br>120%                | 11<br>-15%                             | 45<br>5%         | Construction, real estate, hospitality, manufacturing, technology, transportation, oil and gas, nonprofit, retail, wholesale, restaurant                          | 110                 | BobbiJo DeNofa Broad<br>regional president, OC/IE<br>(949) 474-1550   |
|            |   |  |                           |  |                  |   |                     |                                 |
| 16<br>(17) | <b>Lockton Insurance Brokers LLC</b><br>19800 MacArthur Blvd., Ste. 1250<br>Irvine 92612-2475<br>Kansas City, Mo.<br>Website: <a href="http://lockton.com">lockton.com</a><br>Email: <a href="mailto:inquire@locktoncompanies.com">inquire@locktoncompanies.com</a>                     | \$20.5 million<br>73%                                | 10<br>-33%                | 10<br>-33%                             | 38<br>12%        | Construction, technology, healthcare, real estate, food service, gaming, entertainment  | 100                 | Sallie Giblin<br>president<br>(949) 252-4400/(949) 252-4410   |
|            |    |  |                           |  |                  |   |                     |                                |
| 17<br>(16) | <b>Orion Risk Management</b><br>1800 Quail St., Ste. 110<br>Newport Beach 92660-2340<br>Deerfield, Ill.<br>Website: <a href="http://orionrisk.com">orionrisk.com</a>  | \$18 million<br>20%                                  | 10<br>25%                 | 4<br>100%                              | 54<br>74%        | Automotive, commercial real estate, construction, distribution, food and beverage, healthcare, hospitality, manufacturing, retail, wholesale and captive programs | 148                 | Cliff Davis<br>president<br>(949) 263-8850/(949) 263-8860   |
|            |    |  |                           |  |                  |   |                     |                                |
| 18<br>(18) | <b>AssuredPartners dba Tutton Insurance Services</b><br>2913 S. Pullman St.<br>Santa Ana 92705-5818<br>Santa Ana<br>Website: <a href="http://tutton.com">tutton.com</a><br>Email: <a href="mailto:general@tutton.com">general@tutton.com</a>  | \$12.6 million<br>10%                                | 15<br>-6%                 | 4<br>33%                               | 27<br>-4%        | Construction, fast food, hospitality, manufacturing, distribution, auto dealers, recycling  | 1                   | Mark Shoemaker<br>agency president<br>(949) 261-5335/(949) 261-1991   |
|            |    |  |                           |  |                  |   |                     |                                |
| 19<br>(23) | <b>R.E. Chaix &amp; Associates Insurance Brokers Inc.</b><br>3200 El Camino Real, Ste. 290<br>Irvine 92602-1382<br>Irvine<br>Website: <a href="http://rechaixinsurance.com">rechaixinsurance.com</a><br>Email: <a href="mailto:timc@rechaixinsurance.com">timc@rechaixinsurance.com</a> | \$12.5 million<br>25%                                | 10<br>0%                  | 0<br>NA                                | 22<br>10%        | Retail P&C insurance agencies for GL, professional, excess, property, commercial auto, garage, energy oil and gas, cannabis, cyber                                | 4                   | Timothy Chaix/Stephanie Fanelli/<br>Heather Boemer<br>CEO, president/CMO/treasurer<br>(949) 722-4177/(949) 722-4172 |
|            |    |  |                           |  |                  |   |                     |                                |
| 20<br>(21) | <b>Heffernan Insurance Brokers</b><br>18004 Sky Park Circle, Ste. 210<br>Irvine 92614-6484<br>Walnut Creek<br>Website: <a href="http://heffins.com">heffins.com</a><br>Email: <a href="mailto:tinav@heffins.com">tinav@heffins.com</a>  | \$11.5 million<br>30%                                | 10<br>11%                 | 1<br>0%                                | 23<br>21%        | Nonprofits, manufacturing, security guards, janitorial services, real estate cannabis and construction, surety, financial, personal                               | 14                  | Ben Stern<br>senior VP<br>(949) 771-3404/(949) 771-3401   |
|            |    |  |                           |  |                  |   |                     |                                |
| 21<br>(19) | <b>Brown &amp; Brown Insurance Services of California Inc.</b><br>2401 E. Katella Ave., Ste. 550<br>Anaheim 92806-5962<br>Daytona Beach, Fla.<br>Website: <a href="http://bbrown.com">bbrown.com</a><br>Email: <a href="mailto:billy.hobson@bbrown.com">billy.hobson@bbrown.com</a>     | \$10.4 million<br>-3%                                | 5<br>-29%                 | 5<br>-29%                              | 24<br>-14%       | Finance, real estate, manufacturing, distribution, construction, entertainment, healthcare, property management, municipalities                                   | 450                 | Billy S. Hobson<br>president<br>(714) 221-1800/(714) 221-4196   |
|            |    |  |                           |  |                  |   |                     |                                |
| 22<br>(20) | <b>Church &amp; Casualty Insurance Agency</b><br>3440 Irvine Ave.<br>Newport Beach 92660-3124<br>Newport Beach<br>Website: <a href="http://ccia.com">ccia.com</a><br>Email: <a href="mailto:hello@ccia.com">hello@ccia.com</a>  | \$10.3 million<br>3%                                 | 12<br>0%                  | 1<br>-50%                              | 28<br>0%         | Houses of worship and nonprofits  | 1                   | Travis Tjepkema<br>president<br>(800) 995-7525  |
|            |    |  |                           |  |                  |   |                     |                                |
| 23<br>(22) | <b>Keenan &amp; Associates</b><br>901 Calle Amanecer, Ste. 200<br>San Clemente 92673-4211<br>Torrance<br>Website: <a href="http://keenan.com">keenan.com</a><br>Email: <a href="mailto:info@keenan.com">info@keenan.com</a>   | \$8.7 million<br>6%                                  | 8<br>0%                   | 7<br>0%                                | 3<br>0%          | Public schools, community colleges, cities, counties, hospitals   | 7                   | Sean Smith<br>CEO<br>(949) 940-1760   |
|            |    |  |                           |  |                  |   |                     |                                |

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