

OLI Insurance Services

Year Established: 2017

Agency Members: 65

States Agency Operates In:

AZ, AR, CA, CO, DE, DC, FL, ID, IL, IN, IA, KS, LA, MD, MA, MI, MO, MT, NV, NJ, NM, NY, NC, OH, OR, PA, TN, TX, UT, VA, WA, WI

Description of Network's management structure, goals, and agencies best served:

Our management team is made up of Strategic, Operational and Customer Relationship executives and we are focused on providing our partners with comprehensive resources and solutions to help their agencies grow and thrive. Smaller growing agencies who need broad market access, as well as technology resources, market intelligence & direction and back office support are who we serve most effectively.

OLI's matching focus is around acquiring small agencies, and helping them continue to operate autonomously under their own brand. We expect to acquire 10 small agencies annually for the next 3-5 years.

Premium Controlled by Network:

\$25 - \$100 million

Services and Resources:

In addition to broad market access, OLI offers Affiliates: Market intelligence & guidance, exclusive programs & proprietary products, large accounts support, leverage & niche expertise of parent company, Heffernan Insurance Brokers. In addition, we offer a variety of back-office support options including outsourced Account Managers, dedicated Virtual Assistance, on demand insurance task support, and a sales fulfillment team specializing in commercial, personal, life and group benefits placements.

Top Commercial Lines Carriers:

AmTrust
BHHC
C.N.A.
Employers
Guard
Hanover
Hartford
Hiscox
Liberty Mutual
Nationwide
Philadelphia
Pie
Progressive
Travelers

Top Personal Line Carriers:

ACE/Chubb
AIG
Allied
Guard
Kemper
Mapfre
MetLife
Natgen
Nationwide Private Client
Nationwide
Progressive
Safeco
Travelers

Special Programs or Coverages:

- Non-profit Workers' Compensation
- Janitorial All Lines
- Restaurants Workers' Compensation
- Port 'o' Potty Package
- Nightclub GL
- And more!

Product Mix:

- Property & Casualty %: 90
- Life %: 5
- Annuity/Investments %:
- Health %: 5
- Other %:

Ideal Agency Candidate:

1. Agencies who are not happy with their current access partner and are looking for a new partner that will provide a strong partnership and value proposition.
2. Younger agencies who have a core book of business and are now looking to take their agency to a new level, and understand they need to leverage partnerships in order to get the carriers and resources necessary to take it to the next level.
3. Agency owner who is looking to retire or perpetuate business, with emphasis on preserving the agency's staff, customer experience, and brand legacy.

Qualifications to Join Network:

Minimum Premium/Revenue: \$1,000,000 in premium (will consider new with experience)

Employee Count: n/a

Other Criteria: Must have strong business plan, experience in area of focus, emphasis on growth, looking for true partnership.

Membership Coordinator:

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