

# INSURANCE BROKERS

Rank Prev. Rank	Company •Address	Headquarters •Website •E-mail	Revenue of OC offices for 12 months ended 12-31-2015 •yearly % change	OC licensed P&C producers •yearly % change	OC benefits producers with L&D license •yearly % change	OC support staff •yearly % change	Primary industries served	Companywide offices	Top local official(s) •Title •Phone/fax
<b>1</b> (1)	<b>Alliant Insurance Services Inc.</b> 1301 Dove St., Ste. 200 Newport Beach 92660-2436	Newport Beach alliant.com marcomm@alliant.com	\$111.5 million 14%	26 4%	8 14%	188 7%	Public entity, energy/marine, healthcare, tribal nations, law firms, real estate, construction, agribusiness, automotive specialty, aviation, life sciences/medical products, nonprofits/land trusts, parking/valet, restaurants/lodging, technology/biotech, waste haulers/recycling	90	Thomas W. Corbett chairman/CEO (949) 756-0271
<b>2</b> (2)	<b>Marsh Risk &amp; Insurance Services/Mercer</b> 17901 Von Karman Ave., Ste. 1100 Irvine 92614-5246	New York marsh.com; mercer.com stephen.j.flynn@marsh.com	\$57.5 million 11%	23 21%	26 -13%	126 0%	Real estate, construction, technology, hospitality, retail, healthcare, financial institutions	415	Steve Flynn/Marci Burns managing director/partner (949) 399-5800/(949) 399-5960
<b>3</b> (3)	<b>USI Insurance Services LLC</b> 38 Discovery, Ste. 250 Irvine 92618-3129	Valhalla, N.Y. usi.biz	\$43.9 million -6%	4 -20%	11 -8%	45 -61%	Employee benefits, commercial insurance, real estate, manufacturing, food service, food distributors, wholesalers, healthcare	147	Steve Lathrop employee benefits practice leader (949) 790-9200/(949) 790-6222
<b>4</b> (4)	<b>BB&amp;T Insurance Services of Orange County/Precept Group</b> 2400 E. Katella Ave., Ste. 1100 Anaheim 92806-5980	Irvine insurance.bbt.com mloth@bbandt.com; info@preceptgroup.com	\$39 million 2%	21 0%	33 0%	265 0%	Technology, manufacturing, professional services, nonprofit, aerospace, defense, construction, real estate	179	Martin Loth/Chris Martin CEO, president, BB&T Insurance Services of California/area president (949) 252-4533; (800) 344-1430/(949) 955-9471
<b>5</b> (5)	<b>Arthur J. Gallagher &amp; Co.</b> 18201 Von Karman Ave., Ste. 200 Irvine 92612-1069	Itasca, Ill. ajg.com alice_youngbar@ajg.com	\$36.7 million 7%	14 0%	13 8%	59 28%	Captive programs, real estate, hospitality, financial services (including security broker/dealers & life agents), retail, manufacturing, construction, group health benefits, private & charter schools, public entities, motorsports	350	Alice Youngbar/Scott Gregory area president/area president, benefits and HR consulting (949) 349-9817/(949) 349-9917
<b>6</b> (6)	<b>Aon Risk Solutions</b> 100 Bayview Circle, Ste. 100 Newport Beach 92660-2963	London ars-us.aon.com/socal aonsocal@aon.com	\$34 million <sup>(1)</sup> NA	36 <sup>(1)</sup> NA	10 <sup>(1)</sup> NA	48 <sup>(1)</sup> NA	Construction, property management, technology, life sciences/biotechnology, real estate	500 <sup>(1)</sup>	Jason Peery resident managing director/ senior VP (949) 608-6300
<b>7</b> (7)	<b>SullivanCurtisMonroe Insurance Services LLC</b> 1920 Main St., Ste. 600 Irvine 92614-7226	Irvine sullivancurtismonroe.com info@sullicurt.com	\$32.1 million 5%	33 3%	31 3%	86 0%	Real estate, manufacturing, auto dealers, food industry, healthcare, construction	3	John Monroe CEO/president (949) 250-7172/(949) 852-9768
<b>8</b> (10)	<b>Barney &amp; Barney, a Marsh &amp; McLennan Insurance Agency LLC Company<sup>(2)</sup></b> 101 Enterprise, Ste. 330 Aliso Viejo 92656-2609	White Plains, N.Y. barneyandbarney.com travist@barneyandbarney.com	\$31.2 million 31%	13 8%	8 -11%	83 17%	Technology, life sciences, healthcare, apparel, retail, real estate, construction, manufacturing	81	Travis Trask principal/managing director (949) 900-1780/(949) 643-3719
<b>9</b> (9)	<b>Willis Towers Watson<sup>(3)</sup></b> 18101 Von Karman Ave., Ste. 600 Irvine 92612-1041	London willistowerswatson.com michael.fox@willistowerswatson.com	\$29 million 16%	25 0%	3 0%	59 7%	Residential builders, construction, life sciences, technology, real estate, healthcare, law firms, manufacturing, financial services, retail, food/beverage, public entities/agencies	wnd	Michael Fox market leader, Southern California/Southwest (949) 885-1200/(949) 885-1225
<b>10</b> (11)	<b>Wood Gutmann &amp; Bogart Insurance Brokers</b> 15901 Red Hill Ave., Ste. 100 Tustin 92780-7318	Tustin wgbib.com info@wgbib.com	\$27.8 million 23%	42 5%	3 0%	99 34%	Produce/food processing, restaurants, financial institutions, contractors, manufacturing, technology, apparel, healthcare services, environmental, trucking, moving and storage	7	Kevin S. Bogart CEO (714) 505-7000/(714) 573-1770
<b>11</b> (8)	<b>Brakke-Schafnitz Insurance Brokers Inc., a Signature Company</b> 28202 Cabot Road, Ste. 600 Laguna Niguel 92677-1251	Laguna Niguel sig.us	\$25.6 million <sup>(1)</sup> NA	39 <sup>(1)</sup> NA	9 <sup>(1)</sup> NA	41 <sup>(1)</sup> NA	Real estate, hospitality, financial institutions, manufacturing, construction, transportation	3	Matthew Schafnitz CEO (800) 464-3606
<b>12</b> (12)	<b>Burnham Benefits Insurance Services</b> 2211 Michelson Drive, Ste. 1200 Irvine 92612-0304	Irvine burnhambenefits.com inquiries@burnhambenefits.com	\$18.4 million 16%	0	20 11%	41 8%	Technology, financial services, construction, manufacturing, public sector, education, wholesale apparel, oil and gas, automotive, logistics and transportation	7	Kristen Allison CEO/president (949) 833-2983/(949) 833-9549

Abbreviations: NA: not applicable; NR: not ranked; wnd: would not disclose  
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<sup>(1)</sup> Business Journal estimate

<sup>(2)</sup> Previously listed as Barney & Barney, a Marsh & McLennan Agency LLC Company  
<sup>(3)</sup> Previously listed as Willis Insurance Services of California Inc.

Researched by Dana Truong

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► From page 20

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<b>13</b> (13)	<b>Colony West Financial Insurance Services</b> 201 E. Sandpointe, Ste. 360 Santa Ana 92707-8739	Santa Ana colony-west.com info@colony-west.com	\$17.5 million 4%	21 -5%	6 -14%	19 6%	Retail, wholesale, manufacturing, life sciences, hospitality, healthcare, automotive, construction, banking	4	William F. Kaley president (714) 542-4870/(714) 542-4871
<b>14</b> (14)	<b>Millennium Corporate Solutions</b> 5530 Trabuco Road Irvine 92620-5705	Irvine mcsins.com info@mcsins.com	\$15.8 million <sup>(1)</sup> NA	31 <sup>(1)</sup> NA	2 <sup>(1)</sup> NA	45 <sup>(1)</sup> NA	Construction, manufacturing, retail, homeowners associations	4	Sergio Bechara chairman (949) 857-4500/(949) 857-4800
<b>15</b> (15)	<b>Leavitt Insurance Services of Southern California</b> 1820 E. First St., Ste. 500 Santa Ana 92705-4069	Cedar City, Utah leavitt.com info@leavitt.com	\$14 million <sup>(1)</sup> NA	20 <sup>(1)</sup> NA	6 <sup>(1)</sup> NA	37 <sup>(1)</sup> NA	Warehouse/logistics, real estate, energy, construction, healthcare, manufacturing, technology, employee benefits	125 <sup>(1)</sup>	Angelo Maroutsos president (714) 569-2700
<b>16</b> (16)	<b>Lockton Insurance Brokers LLC</b> 19800 MacArthur Blvd., Ste. 1250 Irvine 92612-2475	Kansas City, Mo. lockton.com gpetrosino@lockton.com	\$13.5 million -2%	6 20%	3 0%	38 9%	Construction, technology, healthcare, real estate, food service, gaming, entertainment	70	Tom McCall executive VP (949) 252-4400/(949) 252-4410
<b>17</b> (18)	<b>EPIC (Edgewood Partners Insurance Center)</b> 19000 MacArthur Blvd. Irvine 92612-1447	San Francisco epicbrokers.com anthony.dasaro@epicbrokers.com	\$11.8 million 5%	11 -8%	7 17%	26 0%	Construction, real estate, hospitality, technology, transportation, oil and gas	29	Anthony J. D'Asaro managing principal (949) 417-9170/(949) 809-2370
<b>18</b> (19)	<b>Brown &amp; Brown Insurance Services of California Inc.</b> 2401 E. Katella Ave., Ste. 550 Anaheim 92806-5962	Daytona Beach, Fla. bbinsurance.com tcasey@bbsocal.com	\$11 million 3%	15 7%	9 29%	29 7%	Finance, real estate, manufacturing, distribution, construction, entertainment, healthcare, property management, municipalities	wnd	Timothy E. Casey executive VP (714) 221-1851/(714) 221-4196
<b>19</b> (17)	<b>George L. Brown Insurance Agency</b> 1005 Calle Recodo San Clemente 92673-5060	San Clemente georgebrowninsurance.com info@georgebrowninsurance.com	\$10.5 million -13%	9 0%	3 0%	12 0%	Shopping centers, wholesale distributors, contractors, restaurants, real estate owners, technology	1	Dean Brown president (949) 361-1400/(949) 361-2767
<b>20</b> (20)	<b>Tutton Insurance Services Inc.</b> 2913 S. Pullman St. Santa Ana 92705-5818	Santa Ana tutton.com bill@tutton.com	\$10.2 million 7%	15 -6%	3 0%	32 10%	Construction, fast food, hospitality, manufacturing, distribution, auto dealers, recycling	1	Stanley W. Tutton president (949) 261-5335/(949) 261-1911
<b>21</b> (22)	<b>SES Insurance Brokerage Services Inc.</b> 1851 E. First St., Ste. 600 Santa Ana 92705-4049	Santa Ana ses-ins.com bmecklenburg@ses-ins.com	\$7.6 million 20%	14 0%	2 100%	15 50%	Financial institutions, real estate investors	1	Bill Mecklenburg president (800) 955-4737
<b>22</b> (NR)	<b>OneDigital</b> 20 Enterprise, Ste. 330 Aliso Viejo 92656-7117	Atlanta onedigital.com llam@digitalbenefitadvisors.com	\$7.2 million -22%	0	10 43%	44 42%	All industry types	36	Christopher Thurin managing principal (949) 328-3080
<b>23</b> (21)	<b>Confie Seguros Holding Co.</b> 7711 Center Ave., Ste. 200 Huntington Beach 92647-9124	Huntington Beach confie.com	\$6.8 million <sup>(1)</sup> NA	1,684 <sup>(1)</sup> NA	wnd	wnd	Auto insurance	671 <sup>(1)</sup>	Valeria Rico/Darrin Silveria/ Michael Kaplan/Martin Rothberg/ Robert A. Bondi CEO/chief sales officer/CFO/ chairman/COO (714) 252-2500
<b>24</b> (23)	<b>Keenan &amp; Associates</b> 901 Calle Amanecer, Ste. 200 San Clemente 92673-4211	Torrance keenan.com info@keenan.com	\$5.9 million 9%	7 0%	8 0%	3 0%	Public schools, community colleges, cities, counties, hospitals	9	John Stephens senior VP, P&C practice leader (949) 940-1760
<b>25</b> (NR)	<b>Northwestern Mutual</b> 18191 Von Karman Ave., Ste. 100 Irvine 92612-7103	Milwaukee irvine.nm.com	\$5 million -4%	0	52 8%	42 5%	Life insurance, disability insurance, long-term care insurance, investments	278	Shawn Mackey managing director (949) 622-7200

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<sup>(1)</sup> Business Journal estimate

Researched by Dana Truong

# Insurance Brokers Grow Revenue 7% to \$624 Million

## Biggest Rise Fastest, Account 75% of Total

■ By MICHAEL DE LOS REYES

Orange County's insurance brokerages grew for a sixth straight year to combine for about a 7% increase in local revenue to \$623.6 million in 2015.

This week's Business Journal list ranks the 25 largest insurance brokerage firms with headquarters or significant operations in Orange County.

Their growth follows a 13% increase in 2014, a 9% jump in 2013, 7% in 2012, 13% in 2011, and 3% in 2010.

This year's growth is almost three times faster than the 2.5% annual growth to \$142 billion experienced by the overall industry in the past five years, according to research firm **IBISWorld** in Santa Monica.

OC's improving economy and lower unemployment rate likely are boosting brokers' revenue. More companies need commercial coverage as they grow and benefits coverage as they hire employees, the research firm said.

Five of the firms reported a drop in revenue, 15 were up, the Business Journal estimated numbers for five, and two companies grew enough to premier on the list.

The firms with \$25 million or more in revenue grew almost three times faster than



**Alliant: maintains top spot with 14% growth**

their smaller competitors—22% versus 7.6%. The larger firms also accounted for 75% of total revenue on the list; they made up 66% of total revenue a year earlier.

Four of the top five firms this year accounted for \$22.6 million, or about 54%, of the total dollar increase on the list.

The list also includes firms' number of licensed brokers, support staff and company-wide offices, though that information didn't factor into the rankings.

The firms combined for 2,109 property and casualty producers, seven more than a year earlier, and 286 benefits producers, up about 3%. They had 1,482 support staffers, up about 2%.

■ **Alliant Insurance Services Inc.** in Newport Beach, the perennial No. 1, had revenue of \$111.5 million, up about 14%. The firm had 26 property and casualty producers, up by one, and eight benefits producers, also up one position. It had 188 support staff, up about 7%.

■ **Marsh Risk & Insurance Services/Mercer** in Irvine is No. 2 with

\$57.5 million, up about 11%. The firm had 23 property and casualty producers, up 21%, and 26 benefits producers, down 13%. It held support staff steady at 126.

■ **USI Insurance Services LLC** is No. 3 with about \$43.8 million, down 6%. The Valhalla, N.Y.-based insurer had four property and casualty producers and 11 benefits producers in its Irvine

office, down one specialist in both categories. It had 45 local support staffers, down 61%.

■ **BB&T Insurance Services of Orange County/Precept Group** in Irvine is No. 4 with about \$39 million, up about 2%. The company's OC employment held steady with 21 property and casualty producers, 33 benefits producers and 265 support staff.

■ **Arthur J. Gallagher & Co.** is No. 5 with \$36.7 million, up about 7%. The Itasca, Ill.-based company had 13 benefits producers in Irvine, hired seven support staff to employ a total of 59, and held steady on property and casualty producers with 14 in its Irvine office.

### Notables

■ **Barney & Barney, a Marsh & McLennan Insurance Agency LLC Co.** rose two spots to No. 8. The White Plains, N.Y.-based firm said its Aliso Viejo office took in \$31.2 million in revenue, up about 31% and the largest percentage increase on

the list. The firm had 13 property and casualty producers, eight benefits producers and 83 staff up 17%.

“Significant organic growth in employee benefits and property and casualty” drove growth at the firm, Managing Director **Travis Trask** said in a written statement.

“Employee benefits grew 42% year-over-year, while property & casualty experienced strong, double-digit revenue growth. During the same period, we had over 100% renewal revenue retention. All of this growth occurred through our existing producer team that continues to win larger and more complex accounts. To maintain our high-touch, client service model, we continued to add support staff in Orange County.”

■ **Wood Gutmann & Bogart Insurance Brokers** in Tustin climbed one spot to No. 10. The firm's revenue rose 23% to about \$27.8 million. It had 42 property and casualty producers, up 5%, and three benefits producers. It increased support staff by about 34% to 99.

■ **OneDigital** debuted at No. 22, with its Aliso Viejo office reporting about \$7.2 million in revenue, down about 22%. The Atlanta-based company formerly was named Digital Benefit Advisors. It had no property and casualty producers; added three benefits producers for a total of seven locally, and increased its support staff by about 42% to 44.

■ **Northwestern Mutual** in Irvine debuted at No. 25 with a little more than \$5 million in revenue, down about 4%. The Milwaukee-based company said its OC office employed no property and casualty producers and had 52 benefits producers and 42 support staff, up 5%. ■

