

OC Insurance Brokers Experience 'Wild Ride'

Say Some Industries Booming Again

By PETER J. BRENNAN

Orange County's largest insurance brokers as a group saw their revenue climb 7.1% last year.

While down from a 10% growth in 2019, it was a relief that it wasn't worse.

"Last year was a wild ride," Irvine's **Burnham Benefits Insurance Services** Chief Executive **Kristen Allison** told the Business Journal.

"All the different industries were trying to navigate COVID and understand what the benefits were provided for, how to get people tested for free.

"When people died, we'd provided support. We felt we were at ground zero helping employers navigate health care," she said.

The 24 biggest brokers with headquarters or significant operations here combined for \$933.8 million worth of policies in 2020.

Twenty reported revenue increases, with only five that saw more than 10% growth. Only two firms reported a decline and two are Business Journal estimates.

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

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

Their revenue growth outpaced their OC support staff, which increased 1.1% to 1,799



as of August. A year ago, a few months after the pandemic broke out, companies had reduced their staff 2.8%.

Ranked insurance brokers reported their counts of property and casualty producers in OC rose for the first time in three years, increasing 3.5% to 385. They had fallen 8.8% last year and 2.1% in 2019.

OC benefit producers jumped 12% to 278, versus a 17% decline last year.

Strong Bounce

No. 9 **Wood Gutmann & Bogart Insurance Services LLC** in Tustin reported revenue grew 8.2% to \$36.8 million.

"The local Orange County economy has bounced strongly out of the prior COVID time, which was horrible on everybody," CEO **Kevin Bogart** said. "Our county was really resilient. Lots of industries are booming."

Those booming sectors include construction, manufacturing, healthcare, security and environmental clients, while the most heavily

affected areas like hotels and restaurants are continuing to face headwinds, he said.

"The insurance brokerage is a microcosm of our local economy," Bogart said.

Bogart said initially, his team was concerned the pandemic would create a two-year slowdown like the 2008 financial crisis.

Instead, he was able to keep all his workers employed and last year's slowdown was short-lived. He expects to add about 20% more employees to his company-wide count of 165.

"We're very blessed we live in Orange County because it's much more dynamic in leading. Our clients are looking to grow their businesses and invest more."

Mental Health Increase

No. 9 Burnham reported revenue at its OC offices rose 15% to \$37.8 million in 2020.

Claims for mental health have skyrocketed, Burnham's Allison said.

"It's so sad," she said. "We have a compassion for mental health. It's an area that we can

all concentrate on."

Burnham is growing significantly this year, around 13% to 15% as many potential clients became real clients after witnessing the efforts by her employees.

"Doing the right thing helped. No question was too small," she said. "We care passionately for the health and welfare of the insured."

Notables

■ Top-ranked **Alliant Insurance Services Inc.** in Newport Beach maintained its top spot as the largest insurance broker based in Orange County (see story, page 22). It's planning a move to Irvine.

■ The Irvine office of No. 2 **Marsh Risk & Insurance Services/Mercer** climbed 13% to \$107 million.

■ Third-placed **USI Insurance Services LLC** in Irvine reported sales increased 4% to \$62.7 million.

■ Nipping at its heels with the No. 4 spot is Chicago-based **Gallagher**, which was the fastest grower on last year's list, up 59%. This year, its Irvine office reported 13% increase to \$62.4 million.

■ The fastest grower was Newport Beach-based **Orion Risk**, which jumped 34% to \$15 million. President **Clifford Davis**, who has been in the insurance industry for 30 years, founded the company in 2001 to serve the retail insurance space.

■ The biggest decliner was No. 12 **HUB International Insurance Services Inc.**, where sales fell 8% to \$34 million at its Newport Beach office. ■

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KRISTEN ALLISON
Regional President
Burnham Benefits Insurance Services



MIKE BIALIK
Area President
Gallagher



KEVIN S. BOGART
CEO
Wood Gutmann & Bogart Insurance Brokers



CLIFF DAVIS
President
Orion Risk Management



SALLIE GIBLIN
President
Lockton Insurance Brokers LLC













TRAVIS TJEPKEMA
President
Church & Casualty Insurance Agency

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 12-31-2020	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 •Headquarters	•yearly % change	•yearly % change	•yearly % change	•yearly % change			•Title •Phone/fax
1 (1)	Alliant Insurance Services Inc. 1301 Dove St., Ste. 200 Newport Beach 92660-2436 Newport Beach Website: alliant.com Email: marcomm@alliant.com	\$204.6 million 9%	34 3%	9 0%	281 1%	Public entity, energy/marine, healthcare, tribal nations, law firms, real estate, construction, agribusiness, financial institutions, mergers and acquisitions, aviation, environmental, private client, life sciences/medical products, nonprofits/land trusts, parking/valet, restaurants/lodging, technology/biotech, automotive specialty	137	Thomas W. Corbett/Greg Zimmer/ Peter Carpenter chairman, CEO/president/COO (949) 756-0271
								
2 (2)	Marsh Risk & Insurance Services/Mercer 17901 Von Karman Ave., Ste. 1100 Irvine 92614-5246 New York Website: marsh.com Email: steven.k.wiens@marsh.com	\$107 million 13%	27 8%	27 8%	137 5%	Real estate, construction, technology, hospitality, retail, healthcare, financial institutions, fitness	425	Steven Wiens managing director (949) 399-5800
								
3 (3)	USI Insurance Services LLC 7535 Irvine Center Drive, Ste. 250 Irvine 92618-2966 Valhalla, N.Y. Website: usi.com	\$62.7 million 4%	11 22%	12 9%	10 -9%	Employee benefits, commercial insurance, real estate, manufacturing, food service, food distributors, wholesalers, healthcare	200	Robert Volkel president, employee benefits West Region (949) 790-9200/(610) 537-2224
								
4 (5)	Gallagher 18201 Von Karman Ave., Ste. 200 Irvine 92612-1069 Rolling Meadows, Ill. Website: ajg.com Email: mary_schwartz@ajg.com	\$62.4 million 13%	32 23%	18 6%	91 1%	Captive programs, real estate, hospitality, financial services, construction, retail, manufacturing, technology, engineers, architects	950	Mike Bialik/Melissa Cerny/Maria King area presidents (949) 349-9800/(949) 349-9900
								
5 (4)	Willis Towers Watson 18101 Von Karman Ave., Ste. 600 Irvine 92612-1041 London Website: willistowerswatson.com Email: michael.fox@willistowerswatson.com	\$55.5 million ⁽¹⁾ NA	10 ⁽¹⁾ NA	1 ⁽¹⁾ NA	40 ⁽¹⁾ NA	Residential builders, construction, life sciences, technology, real estate, healthcare, law firms, manufacturing, financial services, retail, food/beverage, public entities/agencies	439	Michael Fox market leader, Southern California, Southwest (949) 885-1200
								

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6 (6)	Marsh & McLennan Insurance Agency LLC 1 Polaris Way, Ste. 300 Aliso Viejo 92656-5358 New York Website: marshmma.com Email: sam.quigley@marshmma.com	\$49.2 million 5%	16 7%	15 36%	140 7%	Technology, life sciences, healthcare, apparel, retail, real estate, construction, manufacturing, hospitality	195	Sam Quigley managing director, Orange County (949) 900-1780/(949) 643-3719
								
7 (7)	Brakke-Schafnitz Insurance Brokers Inc., a Signature Company 3 Polaris Way, fourth floor Aliso Viejo 92656 Aliso Viejo Website: sig.us Email: matt.schafnitz@sig.us	\$43 million 5%	17 -6%	8 0%	60 -8%	Real estate, hospitality, financial institutions, manufacturing, distribution, technology, construction, transportation	3	Matthew Schafnitz CEO (800) 464-3606
								
8 (8)	McGriff Insurance Services of Orange County 130 Theory, Ste. 200 Irvine 92617-3065 Charlotte, N.C. Website: mcgriff.com Email: mruss@mcgriff.com	\$42.3 million 6%	10 -9%	12 20%	108 -23%	Technology, manufacturing, professional services, nonprofit, aerospace, defense, construction, real estate, municipalities, healthcare	134	Mark Russ Calif. property & causality practice leader (714) 941-2801
								
9 (11)	Burnham Benefits Insurance Services 2211 Michelson Drive, Ste. 1200 Irvine 92612-0304 Irvine Website: burnhambenefits.com Email: inquiries@burnhambenefits.com	\$37.8 million 15%	3 0%	34 6%	52 27%	Public entities, tech/biotech, healthcare, hospitality, manufacturing, professional services, entertainment, automotive, transportation, nonprofit, finance, construction, retail/wholesale, private schools, real estate	8	Kristen Allison regional president (949) 833-2983/(949) 833-9549
								
10 (12)	Wood Gutmann & Bogart Insurance Brokers 15901 Red Hill Ave. Tustin 92780-7318 Tustin Website: wgbib.com Email: kathleenk@wgbib.com	\$36.8 million 8%	33 0%	6 0%	92 14%	Self-insured and captive programs, construction, environmental, real estate, manufacturing, security guards, food and beverage, hospitality, apparel/textiles, technology, healthcare services and facilities, nonprofits, transportation	5	Kevin S. Bogart CEO (714) 824-8309
								

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

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⁽¹⁾ Business Journal estimate

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

► From page 28

RANKED BY OC REVENUE

Rank	Company	Revenue of OC offices for 12 months ended 12-31-2020	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 •Headquarters	•yearly % change	•yearly % change	•yearly % change	•yearly % change			•Title •Phone/fax	
	Company logo								
11 (10)	SullivanCurtisMonroe Insurance Services LLC 1920 Main St., Ste. 600 Irvine 92614-7226 Irvine Website: sullivancurtismonroe.com Email: information@sullicurt.com	\$35 million -3%	31 0%	27 0%	81 0%	Real estate, manufacturing, food, construction, healthcare, auto dealers	3	John Monroe CEO/president (949) 250-7172/(949) 852-9768	
12 (9)	HUB International Insurance Services Inc. 4695 MacArthur Court, Ste. 600 Newport Beach 92660-1861 Chicago Website: hubinternational.com Email: peter.duncan@hubinternational.com	\$34 million -8%	33 22%	31 -6%	122 -8%	All industries	475	Peter G. Duncan executive VP (949) 623-3980/(949) 891-0407	
13 (13)	OneDigital 7755 Irvine Center Drive, Ste. 500 Irvine 92618-2903 Atlanta Website: onedigital.com Email: llam@onedigital.com	\$32.2 million 8%	0 NA	26 86%	123 7%	All industries	198	Russell Gramstad managing principal (949) 494-1643	
14 (15)	EPIC Insurance Brokers & Consultants 3620 Birch St. Newport Beach 92660-2624 San Francisco Website: epicbrokers.com Email: robert.clemo@epicbrokers.com	\$20.7 million 9%	10 -17%	13 -13%	43 -10%	Construction, real estate, hospitality, manufacturing, technology, transportation, oil and gas, nonprofit, retail, wholesale, restaurant	110	Robert W. Clemo managing principal (949) 474-1550	
15 (14)	Colony West Business Risk Solutions 17875 Von Karman Ave., Ste. 150 Irvine 92614-6212 Irvine Website: colony-west.com Email: info@colony-west.com	\$20 million 3%	23 15%	3 50%	33 -6%	Retail, wholesale, manufacturing, life sciences, hospitality, healthcare, automotive, construction, nonprofit and social service	2	William F. Kaley CEO (877) 542-4870	
16 (NR)	Orion Risk Management 1800 Quail St., Ste. 110 Newport Beach 92660-2340 Newport Beach Website: orionrisk.com Email: cdavis@orionrisk.com	\$15 million 34%	8 -11%	2 100%	31 -9%	Automotive, commercial real estate, construction, distribution, food & beverage, health care, hospitality, manufacturing, retail, wholesale and captive programs	124	Cliff Davis president (949) 263-8850/(949) 263-8860	
17 (16)	Lockton Insurance Brokers LLC 19800 MacArthur Blvd., Ste. 1250 Irvine 92612-2475 Kansas City, Mo. Website: lockton.com Email: inquire@locktoncompanies.com	\$11.8 million 5%	15 -6%	15 88%	34 26%	Construction, technology, healthcare, real estate, food service, gaming, entertainment	100	Sallie Giblin president (949) 252-4400/(949) 252-4410	
18 (18)	Tutton Insurance Services 2913 S. Pullman St. Santa Ana 92705-5818 Santa Ana Website: tutton.com Email: general@tutton.com	\$11.4 million 10%	16 -6%	3 -25%	28 -7%	Construction, fast food, hospitality, manufacturing, distribution, auto dealers, recycling	1	Stanley 'Bill' W. Tutton president (949) 261-5335/(949) 261-1991	
19 (17)	Brown & Brown Insurance Services of California Inc. 2401 E. Katella Ave., Ste. 550 Anaheim 92806-5962 Daytona Beach, Fla. Website: bbinsurance.com Email: bhobson@bbsocal.com	\$10.8 million 2%	7 40%	7 17%	28 -15%	Finance, real estate, manufacturing, distribution, construction, entertainment, healthcare, property management, recycling, municipalities	300	Billy Hobson executive VP (714) 221-1800/(714) 221-4196	
20 (NR)	Church & Casualty Insurance Agency 3440 Irvine Ave. Newport Beach 92660-3124 Newport Beach Website: julie@ccia.com Email: julie@ccia.com	\$10 million 3%	12 0%	1 0%	28 0%	Houses of worship	3	Travis Tjepkema president (800) 995-7525	
21 (20)	Heffernan Insurance Brokers 18004 Sky Park Circle, Ste. 210 Irvine 92614-6484 Walnut Creek Website: heffins.com Email: tinav@heffins.com	\$8.9 million 14%	9 -10%	1 0%	19 -10%	Nonprofits, manufacturing, security guards, janitorial services, real estate and construction, surety, financial, personal	14	Ben Stern senior VP (949) 771-3404/(949) 771-3401	
22 (21)	Keenan & Associates 901 Calle Amanecer, Ste. 200 San Clemente 92673-4211 Torrance Website: keenan.com Email: info@keenan.com	\$8.2 million 9%	8 0%	7 0%	3 0%	Public schools, community colleges, cities, counties, hospitals	7	Sean Smith CEO (949) 940-1760	
23 (19)	R.E. Chaix & Associates Insurance Brokers Inc. 3200 El Camino Real, Ste. 290 Irvine 92602-1382 Irvine Website: rechaixinsurance.com Email: timc@rechaixinsurance.com	\$8 million ⁽¹⁾ NA	10 ⁽¹⁾ NA	0 ⁽¹⁾ NA	20 ⁽¹⁾ NA	Retail P&C insurance agencies for GL, professional, excess, property, auto, garage and personal lines	4	Timothy Chaix CEO/president (949) 722-4177/(949) 722-4172	
24 (22)	Confie 7711 Center Ave., Ste. 200 Huntington Beach 92647-9124 Huntington Beach Website: confie.com	\$6.5 million 3%	10 25%	0 wnd	195 14%	Auto insurance, renters insurance, motorcycle insurance, health, vehicle registration renewals, telemedicine, tire hazard, identity theft and hospital indemnity	750	Cesar Soriano CEO (714) 252-2500	

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