



Portfolio Guide

2023 Q2 Edition

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Helping industry leading
specialty business **grow.**

Who We Are

Founded in 2016 with the singular purpose of building a world-class specialty insurance intermediary by acquiring best-in-class underwriting and specialty businesses and providing the resources they needed to grow.

In just a few years, we have grown to a portfolio of 27 companies, managing \$3.5BN GWP, with organic growth of over 10% since our founding and 900+ employees in 34 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 and underwriting.
- 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.

Our Footprint



Built For **Today & Tomorrow**



27

Portfolio
Companies



34

Locations



900+

Employees



\$3.5B

Premium

SPG Divisions



Underwriting

SPG Underwriting is the largest division of the company and core to our culture. As of 2022 year end, we manage ~ **\$1.5B of premium** on behalf of our capacity partners achieving an industry leading 55% 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 to our mission and vision**.

What we bring to the table.

Specialize 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.

Alignment of Interest

We believe in **aligning profitability** throughout the organization in terms of our compensation from carriers and how we compensate our underwriters.

Bespoke Distribution

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

Underwriting and Actuarial Support

Our leadership team consists of proven portfolio managers who provide the right amount of resource to ensure we are **anticipating market shifts** and taking proactive rate and underwriting actions when necessary.

Leading Product Development

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

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. **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 2022 year end, we manage ~ **\$800MM 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



Cyber Liability &
Technology E&O



Hospitality



Complex Risks



Manufacturing



Collections



Accessing our Leadership and 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 Product Officer

Program Submission Building | Connectivity to Program Marketplace | Culture



Chris Lamitola

Chief Sales Officer

Distribution & Cross-Sell | Demand Generation | Brand | Analytics | Talent | Culture



Matt Pinkham

Chief Legal Officer

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

Accessing our Leadership and Capabilities



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

Director of Human Resources

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



Eli Orozco

Director of Marketing

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

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



Scan to Visit

Our Portfolio of Companies



**SPECIALTY WHOLESALE
INSURANCE SOLUTIONSSM**
Division of Specialty Program Group, LLC

WHOLESALE BROKERAGE

E&S Wholesale & Specialty

- Construction
- Wholesale
- Professional

Cindy O'Brien, President
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UNDERWRITING
MANAGEMENT

Elevator Maintenance Contractors

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

John Tateossian, Senior VP
201.585.6514
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elevatorinsurance.com



**SPECIALTY
CAPTIVE GROUPSM**
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 Yapple, VP
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Division of Specialty Program Group, LLC

SPECIALTY BROKERAGE

Recreational Marine

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

Matt Anderson, CEO
231.632.3580
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globalmarineinsurance.com



**SPECIALTY COMP
INSURANCE SOLUTIONSSM**
Division of Specialty Program Group, LLC

UNDERWRITING
MANAGEMENT

Workers Compensation

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

Steve Math, EVP
512.963.5573
steve.math@specialtycompins.com
specialtycompins.com





Division of SPG
Insurance Solutions, LLC
UNDERWRITING
MANAGEMENT



UNDERWRITING
MANAGEMENT

Transportation

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

Clayton Cavell, President
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Renee Paul, Vice President
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bizchoiceins.com



CONTRACT BINDING &
WHOLESALE BROKERAGE

E&S, Wholesale & Binding

- General Liability
- Property
- Package
- Inland Marine
- Excess
- Garage
- Environmental
- Farm & Ranch
- Liquor Liability

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Devon Borisoff, VP
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monarchexcess.com



WHOLESALE BROKERAGE

Professional Management Liability

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

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csrisk.com

Robert Ferretti, Director of UW
770.618.1017
Robert.keystrokeins.com
keystrokeins.com



UNDERWRITING
MANAGEMENT



WHOLESALE BROKERAGE



CLEAR MARINE
RISK SOLUTIONS
Division of Specialty Program Group

UNDERWRITING
MANAGEMENT

Commercial Marine

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

John Logothetis, President
231.932.4099
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clearmarinerisk.com



UNDERWRITING
MANAGEMENT

Cranes

- Crane Rentals
- Millwright and Steel Erection

Megan Rose, President
215.527.9878
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newheightsinsurance.com





PROFESSIONAL PROGRAM
INSURANCE BROKERAGE
Division of SPG Insurance Solutions, LLC

UNDERWRITING
MANAGEMENT

Niche Programs

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

Susan Etter, President
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UNDERWRITING
MANAGEMENT

Security

- Security Guards
- Alarms
- Private Investigators

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845.735.0700
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Marc Katz, Principal
845.735.0700
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mechanicgroup.com



Strategic
Benefit
Resources

WHOLESALE BROKERAGE

Stop Loss Insurance

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

Nathan Reuter, CSO
404.483.7343
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Chuck Haynie, COO
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strategicbenefitresources.com



UNDERWRITING
MANAGEMENT

Underwriting

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

Scott Hendricks, CEO
513.702.0250
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Tim Clinton, President
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avantunderwriters.com



WHOLESALE BROKERAGE

Trucking

- Independent Contractors

Scott Hoy, President
scott.hoy@specialtyprogramgroup.com
avantins.com





Supermarkets

- Small Town grocer to multi-location companies

Bill Morrison, President
816.830.2193
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supermarketinsurancegrp.net



Cannabis

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

Kramer Hendricks, VP
615.983.8995
kramer.hendricks@specialtyprogramgroup.com
safeherb.com



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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b-h-a.com

P1: Amanda Duncan, President
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p1enviro.com



Healthcare Professional Liability

- Nurse Practitioner
- Physical Assistant
- Rehab & Fitness
- Home Health
- Nurse

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Will Sullivan, CUO
646.613.3247
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Cal Sullivan, COO
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csullivan@cmfgroup.com



Life & Financial Products

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

Jason Lea, President
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DIGITAL
SPECIALTY BROKERAGE

Small Commercial

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

Dan Kazan, CEO
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SPECIALTY BROKERAGE

Entertainment

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

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SPECIALTY BROKERAGE

Don Birdsong, Branch Leader
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jonesbirdsong.com



SPECIALTY UNDERWRITING
INSURANCE SOLUTIONS™
Division of Specialty Program Group, LLC

UNDERWRITING
MANAGEMENT

Excess Casualty

- Habitational Excess

Derek Schiavone, President
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spgsuis.com



UNDERWRITING
MANAGEMENT &
WHOLESALE BROKERAGE

Home Builder & Inland Marine

- Builders Risk
- Contractors Equipment
- Home Builders Package

Tim Sunderman, President
513.235.5423
tsunderman@catapultinsurance.com
catapultinsurance.com



Division of Specialty Program Group, LLC

UNDERWRITING
MANAGEMENT

Fiduciary Liability

- Fiduciary Liability
- D&O
- Cyber

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DIGITAL
UNDERWRITING
MANAGEMENT &
SPECIALTY BROKERAGE

Travel

- Cancel for Covid-19 Sickness
- Medical Coverage for Covid-19
- Extension of Coverage
- Medical Evacuation & Reputation
- Cancel For Any Reason
- Trip Cancellation
- Emergency Medical
- Trip Interruption


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To Learn More About SPG

Visit our website

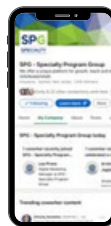
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