



Portfolio Guide

Q1 | 2024

SPG Rankings

Latest 2023 Business Insurance Wholesale/MGA rankings! The hard work and dedication of SPG and its portfolio of brands has reflected in this year's results as we continue climbing the ranks!

Coverholder at **LLOYD'S**

#4 in 2023

MGA/Lloyds Coverhold

SPG jumped from 6th in 2022 to 4th in 2023.

BI

BUSINESS INSURANCE®

#6 in 2023

Specialty Intermediaries

SPG climbed from 7th last year to 6th in 2023.

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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 niche businesses and providing the resources they needed to grow.

In just a few years, we have grown to a portfolio of 29 companies, managing \$3.6BN GWP, with organic growth of over 10% since our founding and 1000+ employees in over 35 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
- Underwriting
- Consulting Facilities

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**.

SPG By The Numbers



6

Divisions



\$3.6B

Premium



1000+

Employees



29

Portfolio
Companies



35+

Locations

Our Footprint



SPG Divisions



Underwriting

As of 2023 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 underwriting execution and discipline**.

Precision. Expertise. Commitment.

Specialized 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.

Bespoke Distribution

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

Leading Product Development

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

Alignment of Interest

We believe in **aligning our compensation plans** throughout the organization with our carrier's profitability.

Actuarial, Data Analytics and Claims Capabilities

Our team consists of proven, **experienced industry specialist** who provide the underwriting teams with clear and consistent insights into their underwriting results, enabling us to **execute with discipline and rigor**. We are proactive in our actuarial disciplines, allowing us to be proactive underwriters. Our claims leaders complement our claims administrators with technical expertise and claim oversight to ensure claims excellence and high customer satisfaction.

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 resources 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 year end 2023, we manage ~ \$1B 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



Hospitality



Cyber Liability &
Technology E&O



Complex Risks



Manufacturing



Collections



Environmental &
Pollution

Learn more by visiting to our specialty programs page on our website or scan:



Scan to Visit

Resources to Scale Your Business



Business Process & Efficiency



Sales & Marketing



Product Development



Operations & Technology



Human Resources



Finance & Accounting



Digital Strategy



Data Analytics



Underwriting



Actuarial



Legal & Compliance



Claims

Learn more by visiting to our [Resource Page](#) on our website or scan:



Scan to Visit

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 | Sales Strategy & Planning |
Sales Analytics & Resources | Producer Recruiting &
Development | Culture



Matt Pinkham
Chief Legal Officer

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



Dennis Kane
EVP Director of Program
Underwriting

Underwriting Governance | M&A | Culture | Underwriting
Business Support

Accessing our Leadership and Capabilities



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
Vice President,
Human Resources

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



Eli Orozco
Vice President, Marketing

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



Curtis Johnson
Senior Vice President
of Claims

Strategic Claims Management | Process Optimization | Operational Efficiency | Culture



Elizabeth Thimme
VP Digital Strategy &
Implementation

Digital Transformation | Strategic IT Projects | Core Business Digital Strategy | Cross Platform Integrations | Culture

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

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INSURANCE SOLUTIONSSM
Division of Specialty Program Group, LLC

UNDERWRITING
MANAGEMENT

Elevator Maintenance Contractors

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

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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
412.992.2853

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INSURANCE AGENCYSM
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
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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

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Renee Paul, Vice President
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Paul Hanson Partners



Biz Choice



Mover's Choice



CONTRACT BINDING &
WHOLESALE BROKERAGE

Commonwealth Underwriters
A Division Of Specialty Program Group, LLC

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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monarchexcess.com



Monarch



CommonWealth



WHOLESALE BROKERAGE



UNDERWRITING
MANAGEMENT



WHOLESALE BROKEAGE

Professional Management Liability

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

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CSRisks



Keystroke



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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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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Marc Katz, Principal

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Strategic
Benefit
Resources

WHOLESALE BROKERAGE

Stop Loss Insurance

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

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Chuck Haynie, COO

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UNDERWRITING
MANAGEMENT

Underwriting

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

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Tim Clinton, President

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avantunderwriters.com



WHOLESALE BROKERAGE

Trucking

- Independent Contractors

Scott Hoy, President

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Supermarkets

- Small Town grocer to multi-location companies

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Cannabis

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

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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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Beacon Hill



PartnerOne



Healthcare Professional Liability

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

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Life & Financial Products

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

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BSMG



BUA



AgencyOne



Division of Specialty Program Group, LLC

DIGITAL
SPECIALTY BROKERAGE

Small Commercial

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

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Jeff Kroeger, President

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insureon.com



Division of Specialty Program Group, LLC

SPECIALTY BROKERAGE

Entertainment

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

Chris Price, Principal

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ESP



SPECIALTY BROKERAGE

Don Birdsong, Branch Leader

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JonesBirdsong



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

UNDERWRITING
MANAGEMENT

Excess Casualty

- Habitational Excess

Derek Schiavone, President

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launched opportunity into action
Division of Specialty Program Group, LLC

UNDERWRITING
MANAGEMENT &
WHOLESALE BROKERAGE

Home Builder & Inland Marine

- Builders Risk
- Contractors Equipment
- Home Builders Package

Tim Sunderman, President

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catapultinsurance.com



UNDERWRITING
MANAGEMENT

Fiduciary Liability

- Fiduciary Liability
- D&O
- Cyber

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Division of Specialty Program, LLC

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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SPECIALTY RETAIL

Recreational Marine

- Extended Marine Service Contracts

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SPECIALTY RETAIL

Entertainment

- Archery
- Axe Throwing
- Escape Rooms
- Bowling Alleys
- And more specialty entertainment facilities

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SERVICES

Risk Services

- Risk Preparedness
- Emergency Response
- Disaster Recovery
- Project Management

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SPECIALTY RETAIL

Sports & Entertainment

- Product offerings
- Carrier Line Up
- Current or prospective large clients and/or partnerships
- Top Competitors
- Strengths/Challenges

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SPECIALTY RETAIL

Sports & Recreation

- National associations
- Teams/leagues
- Camps/clinics
- Sports facilities
- Tournament/event hosts
- Amateur youth and adult
- Accident, General Liability, D&O, Crime, Equipment, etc.
- Instant online quote/pay/print
- Best in industry sports risk management

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UNDERWRITING
MANAGEMENT

Wildfire Personal Lines

- Excess Homeowners

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To Learn More About SPG

Visit our website

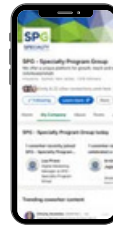
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