



# We Are Oakbridge

## Deeply Rooted to Serve You



Oakbridge is a new kind of insurance and risk management agency, designed to transform and elevate the insurance industry — for your benefit.

Relationships have always been the core strength of the local independent insurer. Agencies across the Southeast are members of their local communities — living, working, and raising their families alongside their clients, personally invested in the well-being of their neighbors and community.

At the same time, the strength of the large brokerage firms has traditionally been the breadth and depth of resources, expertise, and carrier relationships.

Oakbridge is creating a new kind of company, one that combines the best of both worlds. We are building a best in class agency founded on an unwavering commitment to the value of personal relationships paired with the economies of scale available to larger insurance agencies.



Are you ready to identify areas to reduce your liabilities and maximize your investment?





## A Future Purposefully Built with Partners Focused on Their Clients' Needs

As we take a decidedly different path within the industry, we are proud to welcome additional partners to Oakbridge — agencies that reflect our vision, demonstrate our core values, share our culture and are equally committed to doing what's right for our neighbors and colleagues.



## Deeply Rooted in the Southeast.

While our name and business model are new, our history of serving clients throughout the Southeast dates back more than a century – and is deeply rooted in the well-being of the communities we serve.



For decades, the founding firms of Oakbridge have worked alongside each other in towns and cities throughout the region, cultivating similar company cultures and best practices. We've earned each other's respect and share a vision on how we can improve the industry.

The Oakbridge strategy is to grow organically through investments in new talent, client-focused solutions and partner relationships with similarly cultured agencies.



Top 100 Independent Agency – Business Insurance



Top 100 Property/Casualty Agency – Insurance Journal



Best Practices Agency – Reagan Consulting



Top 50 Personal Lines Agency – Insurance Journal



# Insurance Solutions & Business Specialties

## Business Specialties

One of our biggest differentiators is our focus on deep industry knowledge. In fact, each team member selects a primary industry specialization and commits to focusing on that industry. Being intimately familiar with all the nuances and particularities of an industry allows us to serve our clients with the best counsel possible.



AGRICULTURAL



BONDS/SURETY



CONSTRUCTION



HOMEBUILDERS PROGRAM



HOSPITALITY



HUMAN SERVICES/NON-PROFIT



MUNICIPALITIES



LLOYD'S SYNDICATE  
FOR COASTAL  
PROPERTY



SENIOR LIVING



TRANSPORTATION  
PASSENGER TRANSPORTATION



MANUFACTURING

**COMMERCIAL** Regardless of your company's size or complexity, our team can tailor a comprehensive, ready-to-implement coverage plan – one that allows you and your employees to focus on business, not paperwork.

**PERSONAL** Your family's insurance needs are as unique and important as your family itself. Our team's insurance solutions provide superior support when it's most needed – and a foundation of security when it's not.

**RISK MANAGEMENT** We understand the nuances of building a business and fully recognize that no two operations are the same. Our team can help you identify and mitigate existing and future risk, protecting your investments and your company.

**EMPLOYEE BENEFITS** We help our clients develop benefits programs that make a competitive impact for their company while also making a difference in the lives of their employees. We offer the benefits solutions, insight and support that help you recruit and retain the best employees. From cost to compliance, to tailored planning, design and ongoing compliance, our benefits team provides a full range of services that create optimal value for your organization.

