

COMPANY RESOURCE GUIDE

Updated: October 2024





OakbridgeInsurance

Oakbridge Insurance

IMPORTANT INFORMATION

How to Use This Guide

The information in this Resource Guide should help you navigate the many resources and expertise of Oakbridge. Thanks for your commitment to making Oakbridge one of the top insurance firms in the United States.

The Company Resource Guide is updated on a quarterly basis. For the latest information, please visit our website: <u>oakbridgeinsurance.com</u>

Leadership Contacts



Robbie Smith Chief Executive Officer 770-815-8212 rsmith@oakbridgeinsurance.com



Matt James Chief Financial & Chief Acquisition Officer 336-409-6134 mjames@oakbridgeinsurance.com



Message from CEO Robbie Smith

Oakbridge is a different kind of insurance and risk management agency. From our very beginnings, we've set out to transform and elevate the way business is done in our industry. In fact, all of us at Oakbridge are guided by one common mission: We are Deeply Rooted to Serve.

Oakbridge was founded on these guiding principles:

- Community
- Collaboration
- Integrity

The strength of the local independent broker has always been relationships. Brokers in small firms are members of their local communities – living, working, and raising their families alongside their clients, with a personal interest in the wellbeing of their neighbors. At the same time, the strength of the large brokerage firms has always been the breadth and depth of resources, expertise, and carrier relationships. How are we different? Our entire business model is built upon leveraging the strengths of both worlds.

Julie George Chief Revenue Officer 770-676-8548 jgeorge@oakbridgeinsurance.com



Who We Are: We're Oakbridge, Deeply Rooted

- Accountability
- Specialization and expertise
- Achieving a "trusted advisor" status with our clients.



COMPANY HIGHLIGHTS

Rankings

- Source Top 100 Broker List
 Source Top 100 Broker
 Source Top 100 Broker List
 Source Top 100 Broker List
- #42 on Insurance Journal's Top 100 P&C Agency List
- >> IIABA Best Practices Agency
- » Mployer Top Rated Employee Benefits winner



Distributed Ownership

Nearly 50% employee-owned with more than 125 employee-partners



Financial Performance

Surpassing \$110 Million of pro forma revenue with industry-leading margins and organic growth rates by the end of 2024









Employees

500+ insurance and risk management professionals dedicated to serving clients throughout the Southeast

Geographic Expansion

Offices in Alabama, Arkansas, Florida, Georgia, Mississippi, North Carolina, South Carolina, and Tennessee

Integration

Built a fully integrated back office to service all operations including accounting, marketing, information technology, human resources, and proactive services claims processes



PARTNERSHIPS TIMELINE

Winter 2020 Summer 2021 Winter 2021 Founding Agencies: • The Greer Agency, Inc. • Jenkins, Skipworth & • Founders Insurance Group • Pittman Insurance Group Associates. Inc. • Hutchinson Traylor • McNeal Sports & Wilson Risk • McGinty-Gordon & Associates Advisors. Inc. **Fall 2021** • Waites & Foshee Marietta Insurance Services • Snider-Killingsworth Shield Insurance Partners. Insurance Agency Inc. Your Insurance Centers. Inc. • Brock Insurance Agency Inc. & Affiliates **Winter 2022** Spring 2023 **Fall 2023** • A2 Benefits, LLC • Insurance Brokers of Georgia • Mississippi Offices • Swoope Insurance Agency • Akin Insurance Agency, Inc. NorthShore Insurance LLC Hunnicutt Insurance Agency • Hart Hawks Group • Sullivan Trucking Insurance Center of Durham Wilson Insurance Agency • M D Iverson Group • JHA Risk Management Sunland Financial Services, LLC

• Cole Agency, Inc.

• Summer 2023

• Bishop-Durden-Hale Insurance Group



Summer 2022



- Sheldon Baker Benefits Group
- Hull & Associates
- Rogers Insurance Agency



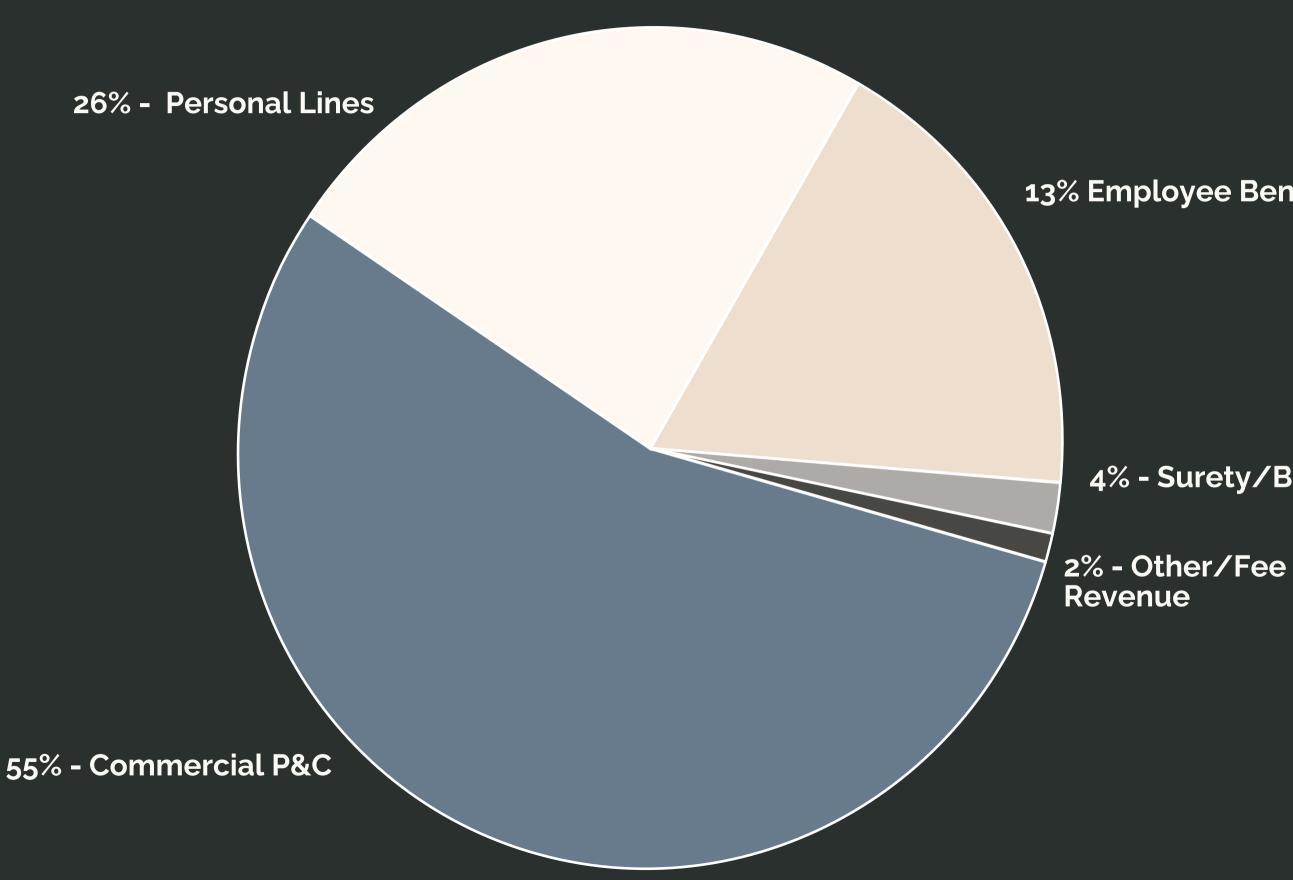
SOUTHEAST FOOTPRINT





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BUSINESS MIX



PROACTIVE 5 SERVICES

CML P&C

- Safety and Loss Control
- Claims
- Claims Analytics
- Alternative Risk

EMPLOYEE BENEFITS

- Compliance
- Communication
- Enrollment
- Claims



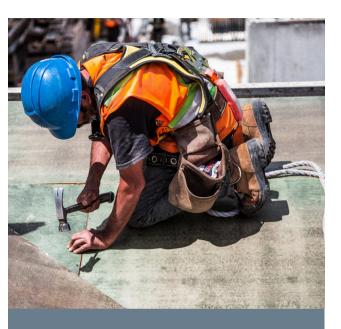
13% Employee Benefits

4% - Surety/Bonds

BUSINESS SPECIALTIES



AGRICULTURE



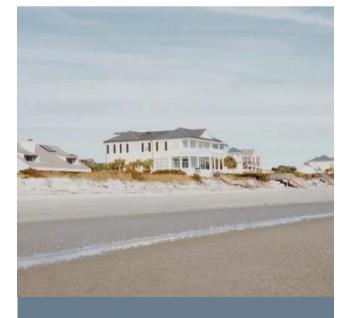
BOND/SURETY



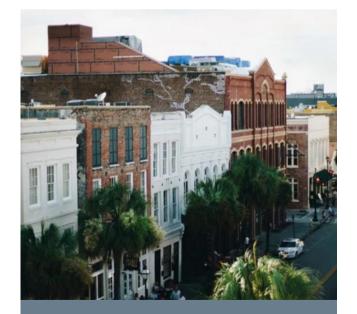
CONSTRUCTION



HUMAN SERVICES/ **NON-PROFIT**



LLOYD'S SYNDICATE FOR **COASTAL PROPERTY**



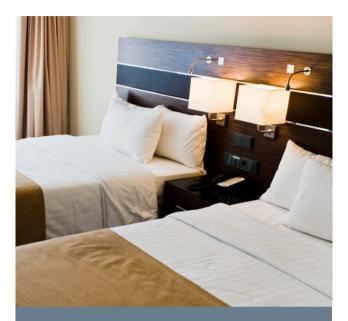
MUNICIPALITIES







HOMEBUILDERS PROGRAM



HOSPITALITY



SENIOR LIVING



TRANSPORTATION

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COMPANY CONTACTS

ACCOUNTING				
Tyler Higginbotham	706-298-2431	thigginbotham@oakk		
BENEFITS FOR OAKBRIDGE EM	PLOYEES			
Megan Penn	706-298-2585	mybenefits@oakbrid		
CARRIER LICENSING & APPOIN	CARRIER LICENSING & APPOINTMENTS			
Luke Ossanna	470-497-3298	lossanna@oakbridge		
CARRIER RELATIONSHIPS				
Frank Eldridge	706-883-2528	feldridge@oakbridge		
CENTRALIZED CL MARKETING				
Joe Swaim	478-330-6299	jswaim@oakbridgein		
CLAIMS				
Clayton Matthews	478-200-2188	cmatthews@oakbrid		





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COMMERCIAL LINES		
Stephanie Cox	706-221-4530	scox@oakbridgeinsur
COMMUNITY DEVELOPMENT		
Donna Davis	912-223-0719	ddavis@oakbridgeir
CORPORATE DEVELOPMENT		
Merritt Choate	323-229-0039	mchoate@oakbridgei
EMPLOYEE BENEFITS		
Rob Taylor	404-397-1070	rtaylor@oakbridgeins
EPIC		
Jean Stroud	478-330-6305	jstroud@oakbridgeins
HUMAN RESOURCES		
Lea Wharton	919-673-0800	lwharton@oakbridgei
Trudi-Ann Francis	470-336-2693	tfrancis@oakbridgein

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COMPANY CONTACTS

INFORMATION TECHNOLOGY

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MARKETING		
Renee Smith	615-881-0420	renees@oakbridgei
PARTNER INTEGRATION		
Ramsey Brock	706-419-3993	rbrock@oakbridgei
PERSONAL LINES		
Scott Kiser	404-422-3035	skiser@oakbridgein
PROACTIVE SERVICES		
Bill Brett	478-960-1827	bbrett@oakbridgeir
Lyndsey Harper	678-764-8171	lharper@oakbridge





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COMPANY CONTACTS

TRAINING		
Jackie Mims	706-221-4549	jmims@oakbridge
SMALL BUSINESS UNIT		
McCay Bowdoin	470-240-4638	mbowdoin@oakb
SURETY		
Ross Chonko	478-330-6322	swood@oakbridg

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BUSINESS SPECIALTY GROUPS

AGRICULTURAL

Oakbridge

Sam Sports	912-285-5343	ssports@oakbridgei
BONDS & SURETY		
Ross Chonko	850-481-3109	rchonko@oakbridge
CAPTIVES		
Trae Vaughan	706-866-3394	tvaughan@oakbridg
CONSTRUCTION		
Brandon Pittman	919-741-5193	bpittman@oakbridg
EMPLOYEE BENEFITS		
Justin White	423-595-8203	jwhite@oakbridgein





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BUSINESS SPECIALTY GROUPS

FORESTRY		
Will Wilson	912-490-5524	wwilson@oakbridge
HABITATIONAL		
Hasten McDermott Brandon Pittman	919-795-3707 919-741-5193	hmcdermott@oakbi bpittman@oakbridg
HOMEBUILDERS PROGRAM		
McCay Bowdoin	470-240-4638	mbowdoin@oakbrid
HOSPITALITY		
Josh Cavallin	678-221-8362	jcavallin@oakbridge
LLOYD'S COASTAL PROGRAM		
Fred McGinty Ty McGinty	912-638-8600 912-268-4613	fmcginty@oakbridg tmcginty@oakbridg



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BUSINESS SPECIALTY GROUPS

MANUFACTURING

Sam Sports	912-285-5343	ssports@oakbridgei
MUNICIPALITIES		
Wesley Smith	706-298-2162	wsmith@oakbridgei
REAL ESTATE		
Frank Eldridge	706-883-2528	feldridge@oakbridg
SENIOR LIVING		
Jeff Rowell	770-854-0387	jrowell@oakbridgei
TRANSPORTATION		
Wes Sullivan	501-680-9023	wsullivan@oakbridg



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OFFICE LOCATIONS

Alabama

- 2012 9th AVE, Haleyville, AL 35565
- 321 1st ST SW, Hamilton, AL 35570

Arkansas

• 2400 Crestwood RD, Suite 202, North Little Rock, AR 72116

Florida

• 29B Miracle Strip PKWY SW, Fort Walton Beach, FL 32548

Georgia

- 12600 Deerfield PKWY, Suite 130, 140, 150, Alpharetta, GA 30004
- 506 Tripp ST, Americus, GA 31709
- 887 W Marietta ST NW, Studio N-108, Atlanta, GA 30318
- 6310 Bradley Park DR, Columbus, GA 31904
- 702 16th AVE E, Cordele, GA 31010
- 200 S Pentz ST, Dalton, GA 30720
- 1009 Bellevue AVE, Dublin, GA 31021
- 3883 Rogers Bridge RD, Suite 403A, Duluth, GA 30097
- 1101 Lake Oconee parkway Suite C, Unit 2, Eatonton, GA 31024
- 320 Oak ST, Eastman, GA 31023
- 8420 Senoia RD, Suite 208, Fairburn, GA 30213
- 200 North Jeff Davis Dr. Fayetteville, GA 30214





205-486-7575 205-921-2141

501-451-3580

850-243-8112

470-410-2595 229-924-1000 404-397-1070 706-323-3613 229-273-1264 706-278-2415 478-272-6010 770-623-8650 770-357-0032 478-374-3445 678-325-7956 770-928-9876



OFFICE LOCATIONS

Georgia, cont.

- 325 S Hill ST, Griffin, GA 30224
- 212 S 10th ST, Griffin, GA 30224
- 125 TownPark DR NW, Suite 350, Kennesaw, GA 30144
- 200 Broad ST, LaGrange, GA 30240
- 3846 Highway 42, Locust Grove, GA 30248
- 850 Walnut ST, Macon, GA 31201
- 16 Hampton St. McDonough, GA 30253
- 319 Walnut ST, Montezuma, GA 31063
- 271 Hwy 74 North Suite 5, Peachtree City, GA 30269
- 1219 Macon RD, Perry, GA 31069
- 823 Chickamauga AVE, Rossville, GA 30741
- 24 Oglethrope Professional BLVD, Savannah, GA 31406
- 225 Marina Drive, St. Simons Island, GA 31522
- 305 W Main ST, Thomaston, GA 30286
- 400 Jackson ST, Vidalia, GA 30474
- 101 Union ST, Vienna, GA 31092
- 627 S Houston Lake Rd. Suite 100 Warner Robins, GA 31088
- 215 Pendleton ST, 2nd Floor, Suite 217, Waycross, GA 31501
- 8358 Main ST, Woodstock, GA 30188
- 635 Molly Lane Suite 210, Woodstock, GA 30189
- 15 Gwyn St. Zebulon, GA 30295





770-228-8441 770-228-7777 678-408-6012 706-884-2361 770-357-0017 478-743-0588 770-957-9005 478-472-2010 770-357-0030 478-987-3163 706-866-3394 912-537-8204 912-638-8600 706-938-6154 912-537-8204 229-268-4751 478-922-9395 912-285-1679 770-592-3132 770-926-3800 770-357-0020



OFFICE LOCATIONS

Mississippi

- 108 N Main ST, Amory, MS 38821
- 3501 Bluecutt RD, Columbus, MS 39705
- 1113 Stark RD, Starkville, MS 39759

North Carolina

- 1920 Front ST, Suite 710, Durham, NC 27705
- 605 D Lynndale CT, Greenville, NC 27836
- 4011 Westchase BLVD, Suite 120, Raleigh, NC 27607
- 950 Country Club RD, Rocky Mount, NC 27804

South Carolina

• 918 S Pleasantburg DR, Greenville, SC 29607

Tennessee

- 715 Market ST, Suite 103, Chattanooga, TN 37402
- 10325 Technology DR, Knoxville, TN 37932





662-256-1100 662-328-1855 662-323-3332

919-471-2541 252-329-0725 919-878-8028 252-442-3186

864-546-0368

423-362-5745 865-675-6500