



COMPANY RESOURCE GUIDE

Updated: October 2024



@OakbridgeInsurance



Oakbridge Insurance

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: oakbridgeinsurance.com

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



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

Who We Are: We’re Oakbridge, Deeply Rooted in Service

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
- Accountability
- Collaboration
- Specialization and expertise
- Integrity
- Achieving a “trusted advisor” status with our clients.

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 well-being 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.



Rankings

- » 56th largest U.S. broker according to *Business Insurance* 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

Founding Agencies:

- Founders Insurance Group
- Hutchinson Traylor
- McGinty-Gordon & Associates
- Waites & Foshee

Summer 2021

- The Greer Agency, Inc.
- Pittman Insurance Group

Fall 2021

- Snider-Killingsworth Insurance Agency
- Your Insurance Centers, Inc.

Winter 2021

- Jenkins, Skipworth & Associates, Inc.
- McNeal Sports & Wilson Risk Advisors, Inc.
- Marietta Insurance Services
- Shield Insurance Partners, Inc.
- Brock Insurance Agency Inc. & Affiliates

Summer 2022

- The Assurance Center
- J. Barry Walker Insurance Group

Fall 2022

- Grimes Insurance & Financial Services

Winter 2022

- Insurance Brokers of Georgia
- NorthShore Insurance LLC
- Sullivan Trucking

Spring 2023

- Mississippi Offices
- Swoope Insurance Agency
- Hunnicutt Insurance Agency
- Wilson Insurance Agency
- JHA Risk Management

Summer 2023

- Cole Agency, Inc.
- Bishop-Durden-Hale Insurance Group

Fall 2023

- A2 Benefits, LLC
- Akin Insurance Agency, Inc.
- Hart Hawks Group
- Insurance Center of Durham
- M D Iverson Group
- Sunland Financial Services, LLC

Spring 2024

- Strawn & Co. Insurance
- Sheldon Baker Benefits Group
- Hull & Associates
- Rogers Insurance Agency

SOUTHEAST FOOTPRINT

4



BUSINESS MIX

PROACTIVE SERVICES

5

CML P&C

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

EMPLOYEE BENEFITS

- Compliance
- Communication
- Enrollment
- Claims

26% - Personal Lines

13% Employee Benefits

4% - Surety/Bonds

2% - Other/Fee
Revenue

55% - Commercial P&C

BUSINESS SPECIALTIES

6



AGRICULTURE



BOND/SURETY



CONSTRUCTION



HOMEBUILDERS
PROGRAM



HOSPITALITY



HUMAN SERVICES/
NON-PROFIT



LLOYD'S SYNDICATE FOR
COASTAL PROPERTY



MUNICIPALITIES



SENIOR LIVING



TRANSPORTATION

COMPANY CONTACTS

ACCOUNTING

Tyler Higginbotham	706-298-2431	thigginbotham@oakbridgeinsurance.com
--------------------	--------------	--------------------------------------

BENEFITS FOR OAKBRIDGE EMPLOYEES

Megan Penn	706-298-2585	mybenefits@oakbridgeinsurance.com
------------	--------------	-----------------------------------

CARRIER LICENSING & APPOINTMENTS

Luke Ossanna	470-497-3298	lossanna@oakbridgeinsurance.com
--------------	--------------	---------------------------------

CARRIER RELATIONSHIPS

Frank Eldridge	706-883-2528	feldridge@oakbridgeinsurance.com
----------------	--------------	----------------------------------

CENTRALIZED CL MARKETING

Joe Swaim	478-330-6299	jswaim@oakbridgeinsurance.com
-----------	--------------	-------------------------------

CLAIMS

Clayton Matthews	478-200-2188	cmatthews@oakbridgeinsurance.com
------------------	--------------	----------------------------------

COMPANY CONTACTS

COMMERCIAL LINES

Stephanie Cox	706-221-4530	scox@oakbridgeinsurance.com
---------------	--------------	-----------------------------

COMMUNITY DEVELOPMENT

Donna Davis	912-223-0719	ddavis@oakbridgeinsurance.com
-------------	--------------	-------------------------------

CORPORATE DEVELOPMENT

Merritt Choate	323-229-0039	mchoate@oakbridgeinsurance.com
----------------	--------------	--------------------------------

EMPLOYEE BENEFITS

Rob Taylor	404-397-1070	rtaylor@oakbridgeinsurance.com
------------	--------------	--------------------------------

EPIC

Jean Stroud	478-330-6305	jstroud@oakbridgeinsurance.com
-------------	--------------	--------------------------------

HUMAN RESOURCES

Lea Wharton	919-673-0800	lwharton@oakbridgeinsurance.com
Trudi-Ann Francis	470-336-2693	tfrancis@oakbridgeinsurance.com

COMPANY CONTACTS

INFORMATION TECHNOLOGY

Henry Mahler	478-747-0219	hmahler@oakbridgeinsurance.com
John Sweet	706-221-2167	jsweet@oakbridgeinsurance.com

MARKETING

Renee Smith	615-881-0420	renees@oakbridgeinsurance.com
-------------	--------------	-------------------------------

PARTNER INTEGRATION

Ramsey Brock	706-419-3993	rbrock@oakbridgeinsurance.com
--------------	--------------	-------------------------------

PERSONAL LINES

Scott Kiser	404-422-3035	skiser@oakbridgeinsurance.com
-------------	--------------	-------------------------------

PROACTIVE SERVICES

Bill Brett	478-960-1827	bbrett@oakbridgeinsurance.com
Lyndsey Harper	678-764-8171	lharper@oakbridgeinsurance.com

COMPANY CONTACTS

TRAINING

Jackie Mims

706-221-4549

jmims@oakbridgeinsurance.com

SMALL BUSINESS UNIT

McCay Bowdoin

470-240-4638

mbowdoin@oakbridgeinsurance.com

SURETY

Ross Chonko

478-330-6322

swood@oakbridgeinsurance.com

BUSINESS SPECIALTY GROUPS

AGRICULTURAL

Sam Sports	912-285-5343	ssports@oakbridgeinsurance.com
------------	--------------	--------------------------------

BONDS & SURETY

Ross Chonko	850-481-3109	rchonko@oakbridgeinsurance.com
-------------	--------------	--------------------------------

CAPTIVES

Trae Vaughan	706-866-3394	tvaughan@oakbridgeinsurance.com
--------------	--------------	---------------------------------

CONSTRUCTION

Brandon Pittman	919-741-5193	bpittman@oakbridgeinsurance.com
-----------------	--------------	---------------------------------

EMPLOYEE BENEFITS

Justin White	423-595-8203	jwhite@oakbridgeinsurance.com
--------------	--------------	-------------------------------

BUSINESS SPECIALTY GROUPS

FORESTRY

Will Wilson	912-490-5524	wwilson@oakbridgeinsurance.com
--------------------	---------------------	---------------------------------------

HABITATIONAL

Hasten McDermott	919-795-3707	hmcdermott@oakbridgeinsurance.com
Brandon Pittman	919-741-5193	bpittman@oakbridgeinsurance.com

HOMEBUILDERS PROGRAM

McCay Bowdoin	470-240-4638	mbowdoin@oakbridgeinsurance.com
----------------------	---------------------	--

HOSPITALITY

Josh Cavallin	678-221-8362	jcavallin@oakbridgeinsurance.com
----------------------	---------------------	---

LLOYD'S COASTAL PROGRAM

Fred McGinty	912-638-8600	fmcginty@oakbridgeinsurance.com
Ty McGinty	912-268-4613	tmcginty@oakbridgeinsurance.com

BUSINESS SPECIALTY GROUPS

MANUFACTURING

Sam Sports	912-285-5343	ssports@oakbridgeinsurance.com
------------	--------------	--------------------------------

MUNICIPALITIES

Wesley Smith	706-298-2162	wsmith@oakbridgeinsurance.com
--------------	--------------	-------------------------------

REAL ESTATE

Frank Eldridge	706-883-2528	feldridge@oakbridgeinsurance.com
----------------	--------------	----------------------------------

SENIOR LIVING

Jeff Rowell	770-854-0387	jrowell@oakbridgeinsurance.com
-------------	--------------	--------------------------------

TRANSPORTATION

Wes Sullivan	501-680-9023	wsullivan@oakbridgeinsurance.com
--------------	--------------	----------------------------------

Alabama

- 2012 9th AVE, Haleyville, AL 35565 205-486-7575
- 321 1st ST SW, Hamilton, AL 35570 205-921-2141

Arkansas

- 2400 Crestwood RD, Suite 202, North Little Rock, AR 72116 501-451-3580

Florida

- 29B Miracle Strip PKWY SW, Fort Walton Beach, FL 32548 850-243-8112

Georgia

- 12600 Deerfield PKWY, Suite 130, 140, 150, Alpharetta, GA 30004 470-410-2595
- 506 Tripp ST, Americus, GA 31709 229-924-1000
- 887 W Marietta ST NW, Studio N-108, Atlanta, GA 30318 404-397-1070
- 6310 Bradley Park DR, Columbus, GA 31904 706-323-3613
- 702 16th AVE E, Cordele, GA 31010 229-273-1264
- 200 S Pentz ST, Dalton, GA 30720 706-278-2415
- 1009 Bellevue AVE, Dublin, GA 31021 478-272-6010
- 3883 Rogers Bridge RD, Suite 403A, Duluth, GA 30097 770-623-8650
- 1101 Lake Oconee parkway Suite C, Unit 2, Eatonton, GA 31024 770-357-0032
- 320 Oak ST, Eastman, GA 31023 478-374-3445
- 8420 Senoia RD, Suite 208, Fairburn, GA 30213 678-325-7956
- 200 North Jeff Davis Dr. Fayetteville, GA 30214 770-928-9876

Georgia, cont.

• 325 S Hill ST, Griffin, GA 30224	770-228-8441
• 212 S 10th ST, Griffin, GA 30224	770-228-7777
• 125 TownPark DR NW, Suite 350, Kennesaw, GA 30144	678-408-6012
• 200 Broad ST, LaGrange, GA 30240	706-884-2361
• 3846 Highway 42, Locust Grove, GA 30248	770-357-0017
• 850 Walnut ST, Macon, GA 31201	478-743-0588
• 16 Hampton St. McDonough, GA 30253	770-957-9005
• 319 Walnut ST, Montezuma, GA 31063	478-472-2010
• 271 Hwy 74 North Suite 5, Peachtree City, GA 30269	770-357-0030
• 1219 Macon RD, Perry, GA 31069	478-987-3163
• 823 Chickamauga AVE, Rossville, GA 30741	706-866-3394
• 24 Oglethroe Professional BLVD, Savannah, GA 31406	912-537-8204
• 225 Marina Drive, St. Simons Island, GA 31522	912-638-8600
• 305 W Main ST, Thomaston, GA 30286	706-938-6154
• 400 Jackson ST, Vidalia, GA 30474	912-537-8204
• 101 Union ST, Vienna, GA 31092	229-268-4751
• 627 S Houston Lake Rd. Suite 100 Warner Robins, GA 31088	478-922-9395
• 215 Pendleton ST, 2nd Floor, Suite 217, Waycross, GA 31501	912-285-1679
• 8358 Main ST, Woodstock, GA 30188	770-592-3132
• 635 Molly Lane Suite 210, Woodstock, GA 30189	770-926-3800
• 15 Gwyn St. Zebulon, GA 30295	770-357-0020

OFFICE LOCATIONS

Mississippi

- 108 N Main ST, Amory, MS 38821 662-256-1100
- 3501 Bluecutt RD, Columbus, MS 39705 662-328-1855
- 1113 Stark RD, Starkville, MS 39759 662-323-3332

North Carolina

- 1920 Front ST, Suite 710, Durham, NC 27705 919-471-2541
- 605 D Lynndale CT, Greenville, NC 27836 252-329-0725
- 4011 Westchase BLVD, Suite 120, Raleigh, NC 27607 919-878-8028
- 950 Country Club RD, Rocky Mount, NC 27804 252-442-3186

South Carolina

- 918 S Pleasantburg DR, Greenville, SC 29607 864-546-0368

Tennessee

- 715 Market ST, Suite 103, Chattanooga, TN 37402 423-362-5745
- 10325 Technology DR, Knoxville, TN 37932 865-675-6500