

EPIC expands Employee Benefits Practice with the acquisition of Executive Financial, Inc. in Southern California

SAN FRANCISCO, Calif., May 18, 2015 (SEND2PRESS NEWSWIRE) – EPIC Insurance Brokers and Consultants, a retail property and casualty insurance brokerage and employee benefits consultant, announced today it has acquired Executive Financial, Inc., an employee benefits consulting firm specializing in executive benefits, life, and disability insurance strategies.

Founded in 1995 by Peter Lizotte, Los Angeles, Calif. based Executive Financial will considerably broaden the specialized brokerage and consulting services available to EPIC clients across the country and position the company for significant growth in the Executive Benefits segment.

“Peter and his team have built a terrific firm and practice,” said Jim Gillette, EPIC Managing Principal in the Southern California Region. “Their addition is an exciting development in the continuing growth of EPIC. Our clients benefit significantly when we add top professionals with a unique and highly specialized practice who bring depth and expertise to our brokerage and consulting platforms.”

Added Peter Lizotte, “As a part of EPIC, we now have access to best in class compliance, communication and wellness services, not only to support our existing clients but also to successfully compete for new business. Additionally, we are very excited about the opportunity to significantly expand our proprietary Executive Disability Income and Life insurance programs under the EPIC brand.”

Since The Carlyle Group became the firm’s major investment partner in December 2013, EPIC has completed nine strategic acquisitions/purchases, adding nearly 400 team members in multiple locations across the United States.

Peter Lizotte can be contacted at:
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About EPIC:

Headquartered in San Francisco, EPIC Insurance Brokers and Consultants has nationwide presence with a depth of industry expertise across key lines of insurance, including commercial property and casualty, employee benefits, unique specialty program insurance, and private client services. Since its founding in 2007, EPIC has grown revenue from \$5 million to \$160 million

through both organic growth and strategic acquisitions, and remains a fixture on the insurance industry's "Best Places to Work" lists. Its strategic partners include private equity firms The Carlyle Group and Stone Point Capital.

To learn more, visit <http://www.epicbrokers.com/>.

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