

# EPIC Expands into New Territory with Acquisition of Treloar & Heisel

SAN FRANCISCO, Calif. and NEW CASTLE, Pa., April 7, 2022 (SEND2PRESS NEWSWIRE) – EPIC Insurance Brokers and Consultants announced today that it has acquired Treloar & Heisel located in New Castle, Pennsylvania. The strategic decision expands the offerings of financial planning and insurance services to medical and dental professionals.



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Treloar & Heisel is a 63-year-old organization specializing in providing life & disability insurance, property & casualty insurance, and financial services to those in the medical and dental industry. These include dental practitioners, specialists, students, and residents. The main focus for the advisors within Treloar & Heisel is to provide education and stability to dental and medical professionals as they begin their careers, as well as when they have become fully established practitioners and are ready to begin planning for retirement and life after practice.

The team at Treloar & Heisel advises over 20,000 dental specialists throughout the country. They partner with and are endorsed by many associations including The American Association of Oral and Maxillofacial

Surgeons, America College of Prosthodontists, The American Academy of Pediatric Dentistry, The American Academy of Periodontology, The American Association of Endodontists, The Chicago Dental Society, The American Academy of Physical Medicine and Rehabilitation, and The American Academy of Implant Dentistry. By being an integral part of these associations, Treloar & Heisel advisors can truly partner with the dental and medical professionals for whom they provide support and services.

Scott Fehrs, ChFC®, Chief Executive Officer and Kenneth Thomalla, CPA, CLU®, CFP®, Chief Operating Officer of Treloar & Heisel will remain a part of the leadership team as they join the EPIC organization.

“Our team is very excited about the opportunities ahead with EPIC. The collaboration will bring both businesses added knowledge capital and business clout. By further collaborating with the experts in the specialty practices across EPIC and the Galway platform of companies, we will be able to bring even more services to our clients,” said Fehrs.

Scott Davis, President, EPIC National Specialties said, “By partnering with the team of experts within Treloar & Heisel, we will be able to continue to evolve our specialty focus and drive greater results. We are fortunate to have this opportunity and look forward to collaborating as we continue to achieve mutual success for our clients.”

#### **About EPIC Brokers & Consultants:**

EPIC Insurance Brokers & Consultants has more than 2,600 team members operating from more than 80 offices across the U.S., providing Property and Casualty, Employee Benefits, Specialty Programs, and Private Client solutions to EPIC clients. For more information visit: <https://www.epicbrokers.com/>

#### **About Treloar & Heisel:**

Treloar & Heisel was founded in 1959 by Dan Treloar. As a premier provider of financial services to dental and medical professionals from training to retirement, its goal is to educate, prepare and protect clients with a comprehensive suite of wealth management and insurance products, customized to their needs. For more information, visit: <https://www.treloaronline.com/>

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