

EPIC Insurance Brokers and Consultants Acquires Trumark Insurance and Financial Services

SAN FRANCISCO and PLEASANTON, Calif., Aug. 8, 2019 (SEND2PRESS NEWSWIRE) – EPIC Insurance Brokers and Consultants, a retail property and casualty insurance brokerage and employee benefits consultant, announced today the acquisition of Trumark Insurance & Financial Services, a Pleasanton, CA-based Brokerage/General Agency specializing in the institutional financial advisory market.



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The acquisition will bring Trumark into EPIC's growing Financial Services Practice and will complement the offerings of EPIC's Vanbridge business, which focuses on alternative asset management, corporate and individual high net worth clients, and solving risk related issues utilizing insurance and alternative capital.

"The addition of Trumark is an exciting step forward for EPIC's Financial Services business, and an excellent opportunity to mutually build on each other's success," said Peter Garvey, CEO of EPIC Insurance Brokers & Consultants. "This transaction furthers our commitment to building our

Financial Services Practice across the country, and we are delighted that the Trumark team has elected to join us on this journey.”

“I’m very proud of the company we’ve built over the last 20 years and believe that joining EPIC is the ideal path forward,” said Tim Bellig, Principal of Trumark.

Added Tom Bellig, also a Principal of Trumark, “Joining EPIC provides us with an extraordinary, complementary portfolio of products and services as well as a significant distribution opportunity.”

“We are excited about what this acquisition means for our evolving Financial Services Practice,” said Mitchell K. Smith, Managing Principal of Vanbridge, an EPIC company. “The addition of Trumark gives EPIC and the Vanbridge business greater depth, scale, and flexibility, allowing our team to further leverage the best-in-class solutions we continue to assemble for the benefit of our clients.”

The transaction closed August 1, 2019 and terms were not disclosed.

About EPIC Insurance Brokers & Consultants and Vanbridge

EPIC is a unique and innovative retail property and casualty and employee benefits insurance brokerage and consulting firm. EPIC has created a values-based, client-focused culture that attracts and retains top talent, fosters employee satisfaction and loyalty and sustains a high level of customer service excellence.

EPIC team members have consistently recognized their company as a “Best Place to Work” in multiple regions and as a “Best Place to Work in the Insurance Industry” nationally.

EPIC now has more than 2,000 team members operating from 65 offices across the U.S., providing Property and Casualty, Employee Benefits, Specialty Programs and Private Client solutions to EPIC clients.

With run rate revenues greater than \$575 million, EPIC ranks among the top 15 retail insurance brokers in the U.S. Backed and sponsored by Oak Hill Capital Partners, the company continues to expand organically and through strategic acquisitions across the country. For additional information, please visit <https://www.epicbrokers.com/>.

Vanbridge is an insurance intermediary and program management business acquired by EPIC in 2018. Vanbridge focuses on alternative asset management, corporate and individual high net worth clients; solving risk related issues utilizing insurance and alternative capital.

Vanbridge’s life insurance, executive benefit and financial advisory wholesale distribution business, consults for advisors and agents around the country. This operation is headquartered in Boca Raton, FL. For additional information about Vanbridge, an EPIC company please visit <https://www.vanbridge.com/> or <http://www.vbiservices.com>.

About Trumark

Trumark's team of advanced point-of-sale specialists, forms strategic partnerships with institutional financial advisors, broker-dealers, P&C firms, RIAs and independent advisors. They implement risk management solutions for their high net worth individual and business clients using an array of insurance products. Trumark's team provides unparalleled expertise in the areas of product evaluation, product structuring, underwriting and case management to deliver professional, ethical solutions that enhance the advisor's relationship with their client. For additional information, please visit <https://trumarkfinancial.com/>.

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