

CASE STUDY AT A GLANCE

Long-time employee benefits client was experiencing growing pains:

- Retirement plan and property and casualty insurance coverage were both with other brokers
- “Cookie-cutter” retirement plan no longer served its employee population
- Property and casualty coverages left key areas exposed to risk

BEFORE

- Separate brokers for each line of business, property & casualty insurance, employee benefits and retirement, made it hard to see gaps and overlaps
- Lack of synergy among multiple brokers hampered long-term value
- Delays and obstacles made communication difficult
- No coordination between employee benefits and retirement offering meant processes weren’t streamlined
- Administrative inefficiencies unnecessarily burdened management

Contact us to learn how we can work together to protect your organization’s now and its future.

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AFTER

- Three lines of business consolidated under a single relationship
- More holistic view of client’s needs, risks, exposures, and opportunities to add value
- Easier communications internally and externally, with the client, and within our teams
- Greater synergy working together to spot coverage gaps, overlaps and other inefficiencies
- Quicker response time when coordinating benefits for new hires who may enroll in both employee benefits and retirement plan
- Ability to share proof of retirement plan compliance practices with underwriters helped secure better rates for liability insurance
- Knowledge for three lines of business kept history of insurance and benefits with a single source

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