

Private Equity Practice

Who we are

\$31.1B

in total limits placed nationally

80+

private equity firms worked with

78

portfolio companies managed

What we do



Our vision

We are dedicated to empowering private equity firms by delivering customized insurance solutions, robust risk management, and innovative employee health and benefits programs designed to support long-term success.



Our passion

We are committed to being the trusted partner private equity firms rely on to build resilient, high performing portfolios and achieve stronger outcomes in any market.

Our service offerings



Retirement



HR consulting



Cyber



Business insurance



International



Executive benefits



Employee health & benefits



Transactional liability



Due diligence

Investment lifecycle support

We partner with private equity firms throughout the investment lifecycle to help enhance decision-making, mitigate risks, and maximize portfolio value. From deal origination through exit, our support is structured across three key phases to address your unique needs:

1

Pre-Close & Due Diligence

- Claim analysis (cost containment strategies)
- Exposure benchmarking
- Cost of risk modeling (collateral optimization)

2

Transaction / Placement

- Program design
- Coverage placement (market access)
- Benefits integration
- Lender compliance
- R&W coordination

3

Risk Services

- HR consulting and compliance advisory
- Safety
- Claims advocacy (reserve reviews)
- Wellness
- Environmental
- Cybersecurity

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