

# LIFE/HEALTH INSURANCE AGENCIES AND BROKERAGES

Ranked by number of local full-time employees as of Jan. 1, 2015

Rank <i>(last year)</i>	Company Address Website	Telephone Fax	Local full-time employees: •2015 •2014 •% change (loss)	Companywide: •Employees •Offices	Percentage of premium volume: •Life •Health/accident •Annuities	Specialty services	•Parent company •Headquarters	•Local executive(s) •Title(s)	Year established locally
<b>1</b> <i>(1)</i>	<b>Barney &amp; Barney, a Marsh &amp; McLennan Agency Co.</b> 9171 Towne Centre Drive, Suite 500, San Diego 92122 www.barneyandbarney.com	800-321-4696 858-909-9729	158 141 12	3,058 75	10 10 80	Employee benefits, retirement services, compensation consulting, compliance, actuarial, innovation	Marsh & McLennan Agency LLC New York	Paul Hering managing principal, CEO	1909
<b>2</b> <i>(3)</i>	<b>HUB International Insurance Services Inc.</b> <sup>(1)</sup> 5375 Mira Sorrento Place, San Diego 92121 www.hubinternational.com	858-373-6900 858-373-6896	123 107 15	7,048 330	8 85 7	Employee benefit and retirement plans, corporate wellness consulting, compensation consulting, workers' comp, executive risk, property and casualty	HUB International Ltd. Chicago	Maggie Osburn executive vice president, employee benefits market leader Mike Barone national president, employee benefits	1975
<b>3</b> <i>(4)</i>	<b>Northwestern Mutual</b> <sup>(2)</sup> 600 W. Broadway, Suite 600, San Diego 92101 www.northwesternmutual.com	619-234-3111 619-234-2911	112 93 20	9,321 350	78 17 5	Insurance services	The Northwestern Mutual Life Insurance Co. Milwaukee	Garrett Bleakley managing partner	1952 <sup>(3)</sup>
<b>4</b> <i>(5)</i>	<b>CBIZ Benefits and Insurance Services Inc.</b> <sup>(4)</sup> 10616 Scripps Summit Court, Suite 250, San Diego 92131 www.cbiz.com	858-795-2000 858-795-7460	67 67 0	4,300 103	50 50 0	Full-service brokerage, wellness, ACA guidance, full administration, life insurance BGA, private exchange	CBIZ Inc. Cleveland	Steve Sublett CEO Kevin Garrett president	1976
<b>5</b> <i>(NR)</i>	<b>WestPac Wealth Partners</b> 750 B St., Suite 2740, San Diego 92101 www.thewp2.com	619-684-6400 619-684-6410	59 53 11	151 7	64 12 24	Business planning, executive benefits, life insurance, disability income planning, wealth management, retirement planning	San Diego	Nash Subotic CEO	2012
<b>6</b> <i>(7)</i>	<b>BB&amp;T - John Burnham Insurance Services</b> 750 B St., Suite 2400, San Diego 92101 www.insurance.bbt.com	619-231-1010 619-236-9134	42 37 14	wnd wnd	wnd wnd wnd	Employer sponsored benefit programs, wellness solutions, technology platforms, funding alternatives, retirement programs	BB&T (Branch Banking and Trust Co.) Winston-Salem, NC	Jim Bayne area president	1891
<b>7</b> <i>(6)</i>	<b>Lockton</b> 4275 Executive Square, Suite 600, La Jolla 92037 www.lockton.com	858-587-3100 858-939-3100	39 37 5	4,600 65	wnd wnd wnd	Benefit administration, alternative finance, actuarial, compliance, health risk management, communications, 401(k), retirement planning	Lockton Cos. Kansas City, Mo.	Jim Skeen Jr. president	2002
<b>8</b> <i>(8)</i>	<b>Alliant Insurance Services Inc.</b> 701 B St., Sixth Floor, San Diego 92101 www.alliantbenefits.com	619-238-1828 na	30 29 3	1,911 59	wnd wnd wnd	Strategy, employee engagement, procurement, analytics, wellness, compliance, benefits administration, global services, mobile technology	Alliant Insurance Services Inc. Newport Beach	Mark Conway senior executive vice president, managing director, benefits	1925
<b>9</b> <i>(13)</i>	<b>Wells Fargo Insurance Services USA Inc.</b> 5901 Priestly Drive, Suite 306, Carlsbad 92008 www.wfis.wellsfargo.com	760-931-3500 877-602-4170	16 14 14	wnd wnd	50 50 0	Employee benefits, health care reform analysis, risk management, special risk, workers' compensation, HR consulting, proprietary resources	Wells Fargo & Co. Chicago	Mark Coulombe senior vice president, team leader employee benefits	2002
<b>10</b> <i>(12)</i>	<b>ISN Network</b> 1525 Faraday Ave., Suite 140, Carlsbad 92008 www.teamisn.com	800-338-1892 760-930-9495	15 15 0	4 2	25 10 65	Back-office support, synergy systems, transition training; ISN Premier- Affluent market	ISN Network Carlsbad	Jeffrey Berson president	1985
<b>11</b> <i>(14)</i>	<b>Teague Financial Insurance Services Inc.</b> 4710 Fourth St., La Mesa 91941 www.teaguefs.com	619-668-5200 800-668-6163	14 13 8	14 1	wnd wnd wnd	Employee benefits, individual plans for health, dental, vision, life, long-term care, retirement, annuities	Teague Financial Insurance Services Inc. La Mesa	April Hammett president	1986
<b>12</b> <i>(15)</i>	<b>Dunhill Marketing &amp; Insurance Services Inc.</b> 2341 Fifth Ave., San Diego 92101 www.dunhillinsurance.com	619-578-7800 619-579-7819	12 12 0	12 1	70 0 30	Life insurance, annuities, estate planning, long-term care, disability, impaired risk life insurance	Dunhill Marketing & Insurance Services Inc. San Diego	Tony Steigerwald president	1992
<b>13</b> <i>(11)</i>	<b>Pacific Southwest Financial</b> 9915 Mira Mesa Blvd., Suite 110, San Diego 92131 www.capitasfinancial.com	858-546-8686 858-546-3978	11 15 (27)	35 4	98 0 2	Life, disability, long-term care, annuities, lifetime settlements, securities, wealth management, financial planning, estate planning	Pacific Southwest Financial San Diego	David Linaugh president	1997
<b>14</b> <i>(18)</i>	<b>Morrison Insurance Services Inc.</b> 6096 Innovation Way, Carlsbad 92009 www.misbenefits.com	760-438-9311 760-438-9355	11 10 10	11 1	15 85 0	Health care reform compliance, health, life, dental, disability and vision insurance; wellness programs, benefit communication, online tools	James M. Morrison Insurance Services Inc. Carlsbad	Jim Morrison president, CEO	2002
<b>15</b> <i>(16)</i>	<b>ELT Insurance Services</b> 16835 W. Bernardo Drive, Suite 212, San Diego 92127 www.eltinsurance.com	858-304-3000 858-753-0091	10 11 (9)	wnd 1	15 80 5	Health, dental, life, long-term care, disability, 401(k)	ELT Insurance Services Inc. San Diego	Edward Lee president	2006
<b>16</b> <i>(17)</i>	<b>Arthur J. Gallagher &amp; Co.</b> <sup>(5)</sup> 10505 Sorrento Valley Road, Suite 200, San Diego 92121 www.ajg.com	858-481-8692 858-481-7953	10 10 0	2,000 100	20 80 0	Full-service insurance broker	Arthur J. Gallagher & Co. San Diego	Gary Levine area president, CEO Ross Afsahi area president	2013
<b>17</b> <i>(9)</i>	<b>DBS- a division of Arthur J. Gallagher &amp; Co.</b> 8880 Rio San Diego Drive, San Diego 92108 www.discoverybenefitsolutions.com	619-704-3503 na	10 10 0	wnd wnd	5 95 0	Full service employee benefit consulting focused on total rewards, health care reform compliance, alternative funding solutions, & HR consulting	Arthur J. Gallagher & Co. San Diego	Brenda Fagan-Johnson area vice president	2008
<b>18</b> <i>(NR)</i>	<b>California Corporate Benefits Insurance Services</b> 16955 Via del Campo, Suite 100, San Diego 92127 www.cabenefits.com	858-753-4102 858-487-2913	7 7 0	7 7	2 80 18	Benefits communications, retirement gap letters, technology services, securities, fiduciary, compliance services	California Corporate Benefits Insurance Services San Diego	Robert Recchia president	1986
<b>19</b> <i>(19)</i>	<b>Nico Insurance Services Inc.</b> 7290 Navajo Road, Suite 101, San Diego 92119 www.nicoins.com	619-667-2111 619-667-2100	6 6 0	7 1	10 90 0	wnd	Nico Insurance Services Inc. San Diego	Steven Nico president	1979
<b>20</b> <i>(11)</i>	<b>Cavignac &amp; Associates Insurance Brokers</b> 450 B St., Suite 1800, San Diego 92101 www.cavignac.com	619-234-6848 619-234-8601	6 5 20	45 1	3 97 0	Life insurance and employee benefit programs, human resource and risk management consulting services	Cavignac & Associates Insurance Brokers San Diego	Jeffrey Cavignac president	1992
<b>21</b> <i>(21)</i>	<b>WSP Corporate Benefits &amp; Insurance Services Inc.</b> 5650 El Camino Real, Suite 207, Carlsbad 92008 www.wspinsurance.net	760-931-0550 760-931-0551	5 5 0	wnd wnd	wnd wnd wnd	Group medical, dental, life, disability, vision, short-term and long-term disability; wellness programs, PPACA; family plans; client advocacy	WSP Corporate Benefits & Insurance Services Inc. Carlsbad	Scott Pieratt president, CEO	2005
<b>22</b> <i>(NR)</i>	<b>Hill Insurance Agency &amp; Financial Services</b> 4550 Kearny Villa Road, Suite 101, San Diego 92123 na	858-569-0500 858-569-0242	1 1 0	3 1	100 0 0	wnd	Allstate Insurance Co. Northbrook, IL	Michael Hill owner	1987

In case of a tie, agencies are ranked by number of 2012 local full-time employees. **(NR)** Not ranked

**wnd** Would not disclose

To the best of our knowledge, this information is accurate as of press time. While every effort is made to ensure the accuracy and thoroughness of the list, omissions and typographical errors sometimes occur. Please send corrections or additions to the Research Department at the San Diego Business Journal. 858-277-6359.

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companies have declined to participate or did not return a survey by press time.

**Source:** The agencies.

<sup>(1)</sup> Listed last year as Intercare Insurance Solutions.

<sup>(2)</sup> Northwestern Mutual is the marketing name for The Northwestern Mutual Life Insurance Company (life, disability insurance, annuities), and subsidiaries including Northwestern Long Term Care Insurance Company

long term care insurance).

(3) The Network Office currently headed by Garrett Bleakley opened for business in 1991.

(4) Also includes CBIZ Life Insurance Solutions Inc.

(5) Listed last year as Gallagher Levine Insurance Services Inc.

**Researched by Leslie Fulton**