FACT SHEET



BENEFITMALL AT A GLANCE

Headquarters: Dallas, TX
 Year Established: 1979

Private Ownership: CRC GroupNumber of Employees: 799

• Number of Offices, Nationwide Coverage: 30

• Carrier Relationships: 200+

Broker Partners: 20,000+Clients (SMBs): 200,000+

• Annualized In-Force Premium: \$8.9 Billion

• Annualized New Coverage Sold (2024): \$2.3 Billion

LEADERSHIP TEAM



PresidentBob Love



Senior Vice President, Administration & Operations Jeff Lewis



Senior Vice President, Carrier Relations Tiffany Stiller



Senior Vice President, Sales & Service John Wiesler



Vice President, Finance Marc Olson



Vice President, Product DevelopmentKatie Crist

ABOUT BENEFITMALL

Headquartered in Dallas, BenefitMall is one of the largest general agencies in the U.S., working with a network of 20,000 brokers to deliver employee benefits to more than 200,000 small and medium-sized businesses. Founded in 1979, BenefitMall leverages innovative technology backed by human expertise to provide a seamless selling experience for its carriers, brokers, and their clients. BenefitMall is part of CRC Group's Specialty + Benefits division, a leading national wholesale distributor of specialty insurance products.

ABOUT CRC GROUP

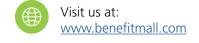
CRC Insurance Services, LLC is one of North America's largest independent wholesale specialty insurance distributors, delivering the broadest range of insurance solutions available in the marketplace today. With over 5,800 teammates in offices across the United States and Canada, CRC Group places more than \$29B in annual premiums across property and casualty and employee benefits. Learn more at www.crcgroup.com.

MEDIA CONTACT INFORMATION

If you are a member of the press and you have a specific inquiry, please send your requests to:



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CRC Group
P| 248.842.1239
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OUR COMMITMENT TO BROKERS

- BenefitMall provides a holistic end-to-end solution for insurance brokers through trusted experts offering tools, services, and technologies to simplify their business and empower them in growing their business.
- BenefitMall plays a critical role in the distribution of employee benefits to small and midsize businesses. All businesses deserve affordable, quality workforce products to help attract and retain talent. BenefitMall provides brokers with access to benefit packages that their clients' employees and families need and value.
- From health coverage to life, disability, dental, vision, and more, BenefitMall connects brokers and their clients with carriers for no additional cost. BenefitMall offers carriers efficiencies in distributing their products and serving their clients beyond their own sales and service groups through reliable alternative means.
- BenefitMall offers brokers a complete 360° digital solution that is paperless, secure, and seamless across every point of client engagement—from quote to enrollment to annual renewals and year-round benefits administration.
- By enabling brokers to better serve employer clients and work more efficiently, BenefitMall delivers its commitment to innovative technology backed by human expertise, for the fastest, easiest, and most trusted benefits selling experience.

CORPORATE HISTORY

Integrated benefits and payroll services, Launched the first online becoming nation's largest provider of insurance quote engine health benefits and payroll solutions **Launched Agency Workspace and Online Enrollment** Rebranded as BenefitMall to providing a simple, secure way for brokers to manage reflect its focus on employee benefits and submit business to BenefitMall Acquired multiple agencies, Strategic focus on benefits by solidifying a nationwide presence exiting the payroll business Launched Client Ready Quote System® (CRQS) **Introduced Marketplace powered** elevating proposal support, plan analysis, by Ease benefits administration plus speed and accuracy Acquired by CRC Group and expanded **Investments made to support ACA** in the Midwest through Mutual Med implementation and compliance

