

BenefitMall at a Glance	
CEO: Scott Kirksey	CFO: Mark Trivette
CIO: Michelle Sheffield	President: Bob Love
VP, Marketing Services: Laura Clenney	
Headquarters	Dallas, TX
Year Established	1979
Private Ownership	CRC Group
Number of Employees	854+
Number of Offices, Nationwide Coverage	26
Carrier Partners	150+
Broker Network	20,000+
Clients (SMBs)	200,000+
Annualized In-Force Premium	\$8.0 Billion
Annualized New Coverage Sold (2022)	\$1.7 Billion

- Website: [www.benefitmall.com](http://www.benefitmall.com)
- LinkedIn: [www.linkedin.com/company/benefitmall](http://www.linkedin.com/company/benefitmall)
- Facebook: [www.facebook.com/BenefitMall](http://www.facebook.com/BenefitMall)
- Contact us: 888-338-6293

#### About BenefitMall:

Headquartered in Dallas, BenefitMall is the largest general agency partnering with a network of 20,000 brokers to deliver employee benefits to more than 200,000 small and medium-sized businesses. BenefitMall uniquely leverages innovative technology backed by human expertise to provide the fastest, easiest, and most secure benefits selling experience for carriers, brokers, and their clients.

#### About CRC Group:

CRC Group is the leading wholesale and specialty insurance distributor in North America. Across property and casualty, executive and professional, group and individual, and other specialty insurance programs, CRC Group places more than \$34 billion in premium annually. Learn more at [www.CRCGroup.com](http://www.CRCGroup.com).

#### Mission:

To provide the fastest, easiest, and most trusted benefits selling experience.

#### Vision:

To empower brokers & consumers, protected by easy access to secure benefits solutions.

#### Values:

- Collaborate to win
- Innovate to simplify
- Have the courage to grow
- Earn trust with every engagement
- Co-create a culture of inclusion

## Who We Are / What We Do / How We Do It / Why It Matters:

- BenefitMall is the largest General Agency partner, providing 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 benefit 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, most secure benefits selling experience.

## Other Interesting Facts:

- Largest General Agency in the U.S.
- Partners with 20,000+ brokers who serve more than 200,000 businesses, primarily SMBs, nationwide.
- Maintains relationships with more than 150 carrier partners that offer products ranging from core medical to ancillary and voluntary products, such as dental, life, vision, disability, and long-term care.
- Maintains \$8 billion annualized, in-force premiums.
- Sold more than \$1.7 billion annualized in new coverage in 2022.

## Corporate History:

For more than four decades, BenefitMall has been dedicated to serving the needs of brokers. Our success has been a result of exceeding customers' expectations and constant progressive growth over the last decade. Here is a brief look at our history:

<b>Today</b>	Headquartered in Dallas, Texas with more than 854 employees across the country.
<b>2022</b>	<p>BenefitMall expands its Marketplace offering to brokers in California, Colorado, Connecticut, New Jersey, New York, Pennsylvania, and Texas. Its Power of YOU Loyalty Program rolls out nationwide.</p> <p>To expand its presence in the Midwest, BenefitMall acquires Davenport, Iowa-based Mutual Med. In September, CRC Group acquires BenefitMall as its employee benefits division.</p>

<b>2021</b>	BenefitMall pilots Marketplace Powered by Ease benefits administration to Florida and Georgia markets. BenefitMall also launches Power of YOU Loyalty Program to brokers in California, Colorado, Texas, and Ohio.
<b>2020</b>	BenefitMall makes the strategic decision to exit the payroll business to focus on growing its benefits division.  BenefitMall acquires Savin Sales Associates, Inc.
<b>2019</b>	BenefitMall launches Agency Workspace and Online Enrollment providing a simple, secure way for brokers to manage and submit business to BenefitMall.  BenefitMall acquires Brown & Brown of Pennsylvania's GA Entity and completes acquisition of Financial Liberty Group, Inc.
<b>2018</b>	Scott Kirksey named CEO. BenefitMall acquires two general agencies – FILCO and Slattery GA. BenefitMall acquires Planet Payroll and Group Strategies, LLC.
<b>2017</b>	Global alternative asset manager, The Carlyle Group acquires BenefitMall.
<b>2015</b>	BenefitMall launches PayFocus – an online payroll and HR solution designed specifically for small and mid-size businesses.
<b>2013</b>	BenefitMall launches new company brand to consolidate its benefits business with the payroll services of CompuPay. With the tagline "All Together, Better," BenefitMall is now the nation's largest provider of health benefits and payroll solutions.
<b>2012</b>	Merges with CompuPay, creating the leading national provider of integrated employee benefits and payroll solutions.
<b>2011</b>	Releases a new Broker Workspace where brokers can view the status of their cases, access exclusive quoting tools, search for documents, and much more.
<b>2010</b>	Launches BenefitMall Individual Exchange, an online solution designed to help Brokers manage their individual business. BenefitMall acquires NAS Financial Services in Morristown, NJ.
<b>2008</b>	BenefitMall acquires BenefitPort Southwest, a full-service General Agency with a division specializing in Senior Products.
<b>2006</b>	BenefitMall acquires Comrisk Insurance, a full-service General Agency specializing in stop loss insurance. BenefitMall acquires Weston Group Benefits, LLC in the Northeast. BenefitMall acquires BenefitPort Southeast that services agents throughout the state of Florida. BenefitMall partners with Allied Capital Corporation, the largest business development corporation in the U.S.

<b>2001-2004</b>	BenefitMall acquires Colorado Group Services, a full-service General Agency. BenefitMall acquires Group One Source, a national employee benefits marketing organization.
<b>2000</b>	BenefitMall launches a completely re-tooled website providing broader applications and easier access for Brokers. BenefitMall acquires two units of The Mather Companies, one of the largest General Agencies and third-party administrators of employee benefits on the East Coast.
<b>1999</b>	Centerstone Insurance and Financial Services separates from Humana and evolves into an independent, stand-alone company. The company is renamed BenefitMall to better represent the total employee benefit products available to Brokers. Acquires several companies, establishing office locations in Georgia, Florida, and New Jersey.
<b>1998</b>	Becomes incorporated in Delaware as Centerstone Holding Corporation with CIFS as a subsidiary.
<b>1997</b>	Centerstone launches the first online insurance quote engine.
<b>1995</b>	Humana acquires Emphesys and its related affiliates, including Centerstone Insurance and Financial Services.
<b>1994</b>	Employers Health Insurance Company (EHI) of Green Bay, Wisconsin acquires Centerstone Insurance and Financial Services.
<b>1993</b>	West Coast becomes Centerstone Insurance and Financial Services after a series of acquisitions.
<b>1991</b>	West Coast acquires a General Agency in California called Multiple Services, Inc.
<b>1985</b>	West Coast launches the first software application capable of producing multi-carrier quotes in real time – an industry breakthrough from brokers.
<b>1979</b>	West Coast Insurance Marketing Corporation is founded in California by a group of insurance professionals.

#### 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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