



Client Frequently Asked Questions

There is a significant new national player that just emerged in our industry. We are part of it, we get to influence it and we get to lead it. You get to benefit from it.

Q. What is Alera Group?

A. Alera Group is a newly-formed employee benefits, property/casualty, risk management and wealth management firm that has been created by merging 24 like-minded, high-performing independent firms across the United States. Upon formation, Alera Group will become the nation's 14th largest independent insurance agency and 7th largest privately held employee benefits firm with \$158 million in revenue, 40 offices nationwide, approximately 750 employees and more than 20,000 clients.

The company's corporate office will be located in Deerfield, Illinois, with member firms and locations throughout the United States.

Q. Why did PWA choose to do this now?

A. Our industry is in the midst of a radical transformation. We were presented with a unique opportunity to form a new company with peer firms that we have known and admired for years. Collectively, we are committed to creating a national firm that will transform the industry and client experience.

Q. What is the meaning behind the name Alera Group?

A. The word "Alera" is derived from the Latin word for "success." It represents speed, simplicity and efficiency, as well as a sense of alertness and clarity. We are committed to building on these attributes to deliver exceptional client experiences and enhance our strong local presence on a truly national scale.

Q. What is the meaning behind the Alera Group logo?

A. This mark portrays strength and solidarity in the shape itself (the triangle being one of the sturdiest geometric shapes). It is balanced and united, similar to Alera Group. This boldly distinctive mark represents the unity and collaborative strength of each firm joining the Alera Group.



Q. Who and where are the firms that make up Alera Group

A. The founding insurance and financial services firms within Alera Group include:

A&B Insurance and Financial, Inc., Tampa, FL
American Insurance Administrators, Inc., Mechanicsburg, PA
Ardent Solutions, Sugar Land, TX
Beacon Retiree Benefits Group LLC, Plantsville, CT
Benico, Ltd., Huntley, IL
Benefit Advisors Network, Solon, OH
CBP, Stamford, CT
C. M. Smith Agency, Inc., Hartford / Central CT
Centennial, Costa Mesa, CA
Coury Health Services, Inc., Pittsburgh, PA
CPI-HR, Solon, OH
Forum, Greenville, SC
GCG Financial, Inc., Deerfield, IL
Group Services, Inc., Bettendorf, IA
HMK Insurance, Bethlehem, PA
INGROUP Associates, Inc., Lancaster, PA
JA Counter, New Richmond, WI
Pentra, Inc., Villanova, PA
PWA Insurance Services, Gold River, CA
Relph Benefit Advisors, Fairport, NY
Shirazi-Miller Benefits, Greeley, CO
SIG, Baltimore, MD
TRUEbenefits, LLC, Seattle, WA
Virtus Benefits, LLC, Nashville, TN

Q. Will the creation of Alera Group affect the service I am currently receiving from PWA?

A. You will not see any immediate changes. Your contacts and services will all remain the same. Your PWA Insurance Services teams will now have the benefit of being able to access over 750 colleagues who have expertise in a wide variety of areas. In addition, with over 20,000 clients, the ability to leverage industry knowledge will be significantly enhanced. Over time, you will benefit directly from enhanced services, new products and improved technologies.

Q. Will my primary contact at PWA Insurance Services change?

A. No.

Q. Who can answer additional questions that I might have?

A. We understand you might have questions. We urge you to get in touch with your PWA Insurance Services Account Executive if you have questions or would like further details about Alera Group.