

# CASE STUDY AT A GLANCE

## Long-time employee benefits client was experiencing growing pains:

- Retirement plan and property and casualty insurance coverage were both with other brokers
- “Cookie-cutter” retirement plan no longer served its employee population
- Property and casualty coverages left key areas exposed to risk

## BEFORE

- Separate brokers for each line of business, property & casualty insurance, employee benefits and retirement, made it hard to see gaps and overlaps
- Lack of synergy among multiple brokers hampered long-term value
- Delays and obstacles made communication difficult
- No coordination between employee benefits and retirement offering meant processes weren’t streamlined
- Administrative inefficiencies unnecessarily burdened management

## AFTER

- Three lines of business consolidated under a single relationship
- More holistic view of client’s needs, risks, exposures, and opportunities to add value
- Easier communications internally and externally, with the client, and within our teams
- Greater synergy working together to spot coverage gaps, overlaps and other inefficiencies
- Quicker response time when coordinating benefits for new hires who may enroll in both employee benefits and retirement plan
- Ability to share proof of retirement plan compliance practices with underwriters helped secure better rates for liability insurance
- Knowledge for three lines of business kept history of insurance and benefits with a single source

*Contact us to learn how we can work together to protect your organization’s now and its future.*

[Contact Us](#)

[View full case study here](#)

*This material has been prepared for informational purposes only. BRP Group, Inc. and its affiliates, do not provide tax, legal or accounting advice. Please consult with your own tax, legal or accounting professionals before engaging in any transaction.*

**AHT**  
**INSURANCE**  
A BALDWIN RISK PARTNER