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OAKBRIDGE EXPANDS EMPLOYEE BENEFITS CAPABILITIES THROUGH PARTNERSHIP WITH THE GREER AGENCY, INC.

Southeastern leader in insurance solutions closes first partnership after formation

ATLANTA (May 7, 2021) – [Oakbridge Insurance Agency LLC \(“Oakbridge”\), a high-growth independent insurance and risk management advisor](#), today announced a new partnership with The Greer Agency, Inc. (“Greer”). Oakbridge and Greer closed the transaction on May 3, 2021, and terms of the transaction were not disclosed. The strategic combination of the two firms will provide clients with enhanced employee benefits offerings and supports Oakbridge’s continued expansion in Georgia and throughout the Southeast.

Over its 50-plus year history, Greer has built a reputation for high-touch client service and a consultative approach to identify the best employee benefits solutions for entrepreneurs in the Southeast. Greer offers a broad range of benefits products to middle-market clients with specialty expertise in municipalities, telecommunications, construction, and multi-site retail, among others.

“All of us at Oakbridge are thrilled to join forces with our new partners at The Greer Agency. Allen and his team have an excellent reputation in the employee benefits space and a 50-year history intensely focused on client service,” said Oakbridge CEO Robbie Smith. “The combination of Greer with Oakbridge will allow both firms to better serve our clients with an expanded suite of resources and end-market expertise.”

“The Greer Agency is culturally aligned with Oakbridge and we look forward to embarking on this new partnership together,” said The Greer Agency President Allen Greer. “We will continue to elevate our benefits solutions and value propositions together.”

The Greer Agency will maintain its office in McDonough, Georgia, and will immediately transition to the Oakbridge brand.

About The Greer Agency, Inc.

The Greer Agency, Inc. is an independent employee benefits insurance provider based in McDonough, Georgia. For over 50 years, the Greer team has supported clients with innovative and consultative employee benefits solutions with a focus on client education and relationship-building seeking to truly understand each clients’ specific needs. Learn more: www.thegreeragency.com

About Oakbridge Insurance Agency LLC

Founded in 2020 through the merger of four leading insurance and risk management firms in the Southeast, Oakbridge Insurance Agency LLC is a rapidly-growing partnership model for firms seeking accelerated growth, access to capital, and an expanded suite of resources with which to serve clients. With approximately 200 employees serving clients in Georgia, Florida, North Carolina, South Carolina, Alabama, and Tennessee, Oakbridge’s unique model creates an opportunity to “buy-in” to a long-term operating platform by distributing ownership interests equitably among employees. Oakbridge is the partner of choice for firms seeking to maintain a high degree of autonomy in their local markets while gaining access to resources and specialty expertise in agri-business, bonds/surety, coastal property, municipalities, senior living, and healthcare, among others. Learn more: www.oakbridgeinsurance.com

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