



The Greer Agency and Oakbridge Insurance

On May 3, 2021, I fulfilled a dream I have had for many years and none of it would have been possible without you. The Greer Agency was officially acquired by Oakbridge Insurance. They acquired our assets and our personnel, so Ashley and I are not going anywhere. Nothing really changes right now. Our phone number is still the same, but it will eventually be answered "Oakbridge Insurance". Our emails are the same but will eventually migrate to the Oakbridge address. We will continue to keep Greer.us and Thegreeragency.com emails as well so you don't have to switch anything right now. We will be updating our website with new information. I am not retiring or quitting. In fact, I am more excited about the opportunities for me and my clients than I have been in the last 34 years in this business.

So if nothing changes, what is the advantage of being acquired? Businesses change and I have seen a lot of change in the last 34 years. I also realized to continue to grow and push myself that I had to have the support of a larger network, back office, personnel, and products. I know the type of talent going forward that a successful agency must have in place and frankly I did not want to build out all of that on my own again. We are currently stretched pretty thin and it was hampering future growth. The second major advantage is that it offers me an eventual exit strategy. Many of you knew my father and founder of The Greer Agency, Ron Greer. His exit strategy was ME. I do not have that option. For me to eventually retire, I want to have in place a seamless and perfect fit for all my clients that is bigger than me.

So who is Oakbridge Insurance? Oakbridge Insurance is a new entity created in 2020 when four prominent agencies with different specialties (Hutchison Traylor, Waites and Foshee, Founders, and McGinty Gordon) merged to create a Top 100 National agency in terms of revenue (\$31M in 2020). Backed by private equity, Oakbridge has the capital and looks to expand across the Southeast through acquisitions like mine and internal growth. Oakbridge has over 180 employees and more than 20 offices currently across the State of Georgia.

Oakbridge is the equivalent of a large law firm. Excellent, experienced brokers with different specialties that leverage each other's knowledge and experience for the benefit of our clients. In the past we were limited to our area of expertise, employee benefits and life insurance. Now we have the experience and expertise in house to handle any of your insurance needs. We will partner with experts for your coverage and be the point person so you only have to make one call. Then we compliment that with a huge back office of long tenured employees who are specialists in each field to make it all go efficiently. We are one of the employee benefit experts that other brokers will bring to their clients.

Through this new endeavor, we now have the market availability to cover ALL of your insurance needs. Liability, Business, Property, Garage, Fleet, Apartments, Senior living, Malpractice, Umbrella, you name it, we have a market and an expert in that field. If you have an insurance need, we can now help. We also have one of the largest bonding capabilities in house for the construction industry. In addition, we have a Private Client Group, where once qualified, you can have every insurance need, personal, professional and business coordinated under one umbrella, one account manager and one point of contact for everything.

All of this is possible because of you. Without you, I would not have had this opportunity and for that I thank you. If you have any questions, please reach out to me. I am so excited about this opportunity and the ability to help you more and help more people, so please let us help. Thanks again.