

OLI Insurance Services, Inc. Acquires Walton and Associates Insurance Services

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OLI Insurance Services →
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WALNUT CREEK, Calif., August 10, 2021 /PRNewswire/ -- **OLI Insurance Services, Inc.**, a subsidiary of Heffernan Insurance Brokers providing market access and support services to local insurance agencies, has acquired Walton and Associates Insurance Services effective August 1, 2021. The San Jose, California-based Walton and Associates focuses on a variety of commercial lines and personal insurance products for clients in the Bay Area and Northern California.

Walton and Associates Insurance opened its doors in 1966 in San Jose, as a customer-centric and family-run insurance agency operated by Verne and Susan Walton. Their agency team will continue to be led by their daughters, Jamie Anderson and Wendy Volpatti. The company will operate autonomously as a subsidiary agency, leveraging OLI's and Heffernan's market access, resources, and support to grow the agency.

"We are enthusiastic and confident that the Heffernan Walton partnership will create a viable, strong, and successful force in our marketplace while building upon a base Walton Insurance started 55 years ago," said Susan and Verne Walton. "Going forward, we see unlimited opportunities and look forward to the many enhancements and resources this acquisition brings."

"We are excited to have Walton and Associates join our network of local agencies. We are combining the Walton and Valley General Insurance Services teams, who OLI also recently acquired, which will create an exceptional agency with a strong leadership team that focuses



on customer satisfaction, employee career opportunities, and growth," said John Prichard Jr., president of OLI Insurance Services. "By leveraging OLI's and Heffernan's resources, support and mentorship, we are confident this agency will be a force to be reckoned with."

As part of the next phase of OLI's and Heffernan's growth strategy, we are interested in collaborating with privately held independent brokers across the United States. If you are interested in learning more, please contact Matt McKenna, Director of Corporate Development, at 925-746-7962 or matthewmc@heffgroup.com.

About OLI

Oli Insurance Services, Inc., formed in 2017, helps small independent agencies grow by providing exceptional market access, new business fulfillment, back office support, and technology solutions to help improve efficiency as well as initiate revenue streams outside their core competencies (i.e. employee benefits, life insurance, personal lines, and property & casualty). For those agents nearing retirement, OLI also offers an exit strategy solution.

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