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November 18, 2021



Alera Group, a top independent, national insurance and wealth management firm, announced today the acquisition of Schwartz Insurance Agency, an Arizona based firm specialized in commercial insurance.

“We focus on our clients’ objectives and then apply our knowledge, experience and trusted relationships to design programs that achieve the intended outcome,” said Alan “Duke” Schwartz, CIC, Managing Principal at Schwartz Insurance Agency. “Our years of industry experience allow us to consult, develop and implement risk management strategies that pinpoint the most effective action for our clients.”

Schwartz Insurance Agency specializes in providing Commercial Property & Casualty insurance, offering a wide range of services including placement, risk management, claims administration and analysis, training and benchmarking.

Schwartz Insurance Agency will expand Alera Group’s footprint in Arizona and will strengthen the firm’s existing commercial insurance expertise. Schwartz Insurance Agency joins Alera Group through Benefit Commerce Group (BCG), an Alera Group company based in Scottsdale. The Schwartz Insurance Agency team will relocate to the BCG offices in Scottsdale and continue serving clients in their existing roles. Terms of the transaction were not announced.

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## About Alera Group

Alera Group is an independent, national insurance and wealth management firm with more than \$850 million in annual revenue, offering comprehensive employee benefits, property and casualty insurance, retirement services and wealth management solutions to clients nationwide. By working collaboratively across specialties and geographies, Alera Group’s team of more than 3,000 professionals in more than 120 offices provides creative, competitive services that help ensure a client’s business and personal success. For more information, visit [www.aleragroup.com](http://www.aleragroup.com) or follow us on [LinkedIn](#).

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MAY 23, 2022

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