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Alera Group Enhances Risk Management Industry Expertise with Acquisition of Heritage Risk Management

JANUARY 20, 2022



Alera Group, a top independent, national insurance and wealth services firm, announced today the acquisition of Heritage Risk Management, a network of independent risk management agencies which serve clients throughout Texas, Oklahoma, Colorado and New Mexico.

"At Heritage Risk Management, our independent agencies are able to stay close to clients and deliver personalized, comprehensive risk management solutions. With 178 years of shared experience between our network agencies, we bring extensive knowledge in developing tailored property and

casualty insurance solutions for our clients," said Jeff Neely III, Co-Chief Executive Officer at Heritage Risk Management.

Heritage Risk Management's network of independent risk management agencies offer a broad array of products and services, tapping into a deep well of expertise from across the organization to offer thought leadership in risk management across a myriad of industries including Agriculture, Banking, Oil & Gas, Construction, Transportation, Professional Services, Technology, Manufacturing, Healthcare, Medical Malpractice and Employee Benefits.

"Heritage Risk Management offers expanded support services and strong carrier relationships to meet client's needs. As an integrated risk management provider, Heritage Risk Management has all the capabilities needed to deliver the best protection possible and their collaborative culture makes them an excellent fit for Alera Group," said Alan Levitz, CEO of Alera Group.

The Heritage Risk Management team will 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 services firm with more than \$850 million in annual revenue, offering comprehensive employee benefits, property and casualty, retirement plan services and wealth services solutions to clients nationwide. By working collaboratively across specialties and geographies, Alera Group's team of more than 3,500 professionals in more than 130 offices provides creative, competitive services that help ensure a client's business and personal success. For more information, visit www.aleragroup.com or follow us on [LinkedIn](#).

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