

Aldrich Announces Acquisition of Aldrich Benefits LP by Alliant Insurance

Presented by the Aldrich Group of Companies |

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LAKE OSWEGO, OR, JAN 8, 2024— The Aldrich Group of Companies, a leading provider of financial, wealth, tax, and business transition strategies, announced that Aldrich Benefits LP has been acquired by [Alliant Insurance Services](#), Inc. The Aldrich companies will continue to provide financial, wealth, tax, and business transition strategies and services to clients through its [Aldrich CPAs + Advisors LLP](#), [Aldrich Wealth LP](#), and [Aldrich Capital LP](#) practices.

“Aldrich Benefits has been an important part of our firm’s success and growth,” said [Melissa Berndt](#), Aldrich’s Partner of Shared Services and General Counsel. “At Alliant, they will be able to continue their journey as part of a company that has a culture and values similar to those at Aldrich, while we continue our focus on our financial, wealth, and tax clients.”

“Joining Alliant will allow our team to deliver even more value to our clients, as well as create new and exciting career opportunities for our professionals,” said Tracey Davis, Partner and President of Aldrich Benefits LP. “Alliant shares our dedication to exceptional client service, along with our common values and an aligned vision for growth.”

“The people at Aldrich have an innate entrepreneurial spirit that closely matches Alliant’s,” said Tom Corbett, Chairman and CEO of Alliant. “That cultural compatibility combined with their long-standing relationships in a wide variety of industries made Aldrich Benefits a natural fit.”

Aldrich established its employee benefits business in 2003, and today, it serves construction, manufacturing, healthcare, telecommunications, utilities, and professional services companies, among others. The benefits practice is known in the market for its expertise in managing clients’ complex benefits needs, strategic plan consulting, and client advocacy.

The entire Aldrich Benefits LP team will join Alliant. Terms of the agreement were not disclosed.

About Aldrich

The Aldrich Group of Companies provides financial, wealth, tax, and business transition strategies and services to clients. With offices across the West Coast of the U.S., Aldrich has worked closely with businesses, business owners, and individuals for more than 50 years to understand and help deliver on their growth goals. Aldrich includes one of the U.S.'s Top 100 Accounting Firms, which provides tax, advisory, and consulting services to businesses and individuals, with deep expertise across an array of industries. Aldrich includes the following professional services firms: [Aldrich CPAs + Advisors LLP](#), [Aldrich Wealth LP](#), and [Aldrich Capital LP](#).

About Alliant Insurance Services

Alliant Insurance Services is one of the nation's leading distributors of diversified insurance products and services. We operate through a network of specialized national platforms and local offices to offer our clients a comprehensive portfolio of solutions built on innovative thinking and personal service. The business of managing risk is getting more complex, and Alliant is meeting this complexity head-on, not with more layers of management, but with more creativity and agility. Alliant is changing the way our clients approach risk management and benefits, so they can capitalize on new opportunities to grow and protect their organizations. Visit us at alliant.com.