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## EPIC grows in Chicago with Chartwell acquisition

Move expands its private client practice



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By Rod Bolivar

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EPIC Insurance Brokers & Consultants has expanded its private client practice with the acquisition of Chartwell Insurance Services, a Chicago-based firm specializing in personal property and liability coverage for high-net-worth individuals and families.

The move strengthens EPIC's presence in Chicago and the broader Midwest while enhancing its ability to provide customized risk management solutions nationwide.

Founded and led by Rebecca Korach Woan, Chartwell has built a client base seeking specialized coverage for fine art, jewelry, vintage automobiles, residences, and yachts.

EPIC, which provides property and casualty, employee benefits, and private client insurance solutions across a nationwide network of offices, has been expanding its private client division with a focus on Chicago as a key growth market.

The acquisition follows the 2024 integration of Phillips Bros. Insurance Agency, a multi-line firm with expertise in private client and commercial property and casualty coverage.

These strategic moves reflect EPIC's continued investment in the region and its commitment to addressing the complex insurance needs of high-net-worth clients.

EPIC Private Client president, [Kevin Daley](#), described Chartwell as a strong addition to the firm with specialized expertise and focus on client service. He stated that both organizations share a commitment to providing customized insurance solutions and trusted guidance.

As part of its expansion efforts, EPIC has also made leadership changes to support its growth and specialized client services. In November, the [company promoted](#) Philip V. Moyles to co-president alongside Tom O'Neil, while Gregg Bundschuh was appointed chief growth officer, succeeding Moyles.

Additionally, EPIC recently [added three professionals](#) to its Midwest team, strengthening its presence in the St. Louis market, particularly in employee benefits consulting and the property and casualty sectors. Rick Frechmann joins as managing principal, while Joleen Mayfield and Bradley Snitzer will serve as principals. These leadership and team expansions reflect EPIC’s commitment to scaling its operations and enhancing its expertise across key markets.

*As EPIC expands its private client offerings, what impact do you think this acquisition will have on the high-net-worth insurance market? Share your thoughts in the comments.*

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