

Jan 22, 2026 8:00 AM Eastern Standard Time

Warner Pacific Acquires Brokers Holding Group

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Acquisition strengthens Warner's level-funded capabilities and Southeast footprint, accelerating growth in a rapidly evolving employee benefits market

WESTLAKE VILLAGE, Calif.--(BUSINESS WIRE)--Warner Pacific, a trusted General Agency for brokers nationwide, today announced the acquisition of Brokers Holding Group ("BHG"), a South Carolina-based general agency with deep expertise in level-funded health plans and alternative funding strategies for employer groups. The acquisition represents a key geographic expansion for Warner Pacific, establishing a stronger presence across the Southeast, including South Carolina, North Carolina, Georgia and Tennessee.

Founded in South Carolina, Brokers Holding Group has earned a reputation as a trusted partner to independent brokers, particularly in the design, implementation, and servicing of level-funded and alternative funding arrangements for employers. As part of Warner Pacific, Brokers Holding Group will continue to operate under its existing brand, ensuring continuity for broker partners while gaining access to Warner Pacific's broader carrier relationships, technology, resources and operational scale. BHG co-owners Scott Lee and Lee Long will continue to lead the business, helping to spearhead growth efforts across the Southeast and beyond.

"Level funding continues to gain momentum as employers look for greater control, transparency, and predictability in their healthcare spend," said John Nelson, Chief Executive Officer of Warner Pacific. "We've built a strong foundation in this space, and this partnership allows us to build on that expertise while expanding our

presence in an important and growing region of the country. BHG brings specialized experience and trusted broker relationships that complement our marketplace and long-term growth strategy, and we look forward to the journey ahead.”

“We’re thrilled to be joining the Warner family,” said Scott Lee, Principal of BHG. “Demand for level-funded solutions is growing rapidly across the country, and Warner Pacific’s scale and resources allow us to meet that demand more effectively while broadening the resources and expertise for our brokers.”

“Warner Pacific shares our broker-first mindset,” added Lee Long, Principal of BHG. “Together, we’re well-positioned to expand our suite of solutions across South Carolina, North Carolina, Georgia, Tennessee, as well as integrating these capabilities with brokers nationwide.”

The acquisition reflects Warner Pacific’s broader strategy to expand its general agency platform through a combination of organic growth and targeted acquisitions, with a particular focus on high-growth funding models and strategically important regions.

About Warner Pacific

Warner Pacific is a nationally recognized General Agency (GA) and consulting partner, dedicated to empowering brokers across the United States. With over \$10 billion in in-force premiums annually, servicing more than 80,000 in-force groups, and a team of 650+ professionals, Warner Pacific delivers unparalleled support and expertise. For over 40 years, Warner Pacific has provided comprehensive employee benefits solutions, compliance assistance, HR resources, and cutting-edge technology to insurance brokers and agents in Arizona, California, Colorado, Illinois, Iowa, New York, Ohio, Oklahoma, South Carolina, Texas, Florida, and Minnesota. As a top-producing GA for many of the nation’s largest insurance carriers, Warner Pacific has forged strategic partnerships with over 180 carriers. Discover more at www.warnerpacific.com.

Warner Pacific is backed by Lovell Minnick Partners (“LMP”), a private equity firm that partners closely with leadership teams to drive organic growth and strategic acquisitions, creating meaningful value and building successful, enduring businesses.

About Brokers Holding Group

Brokers Holding Group is a diversified financial services firm focused on delivering customized solutions across insurance, risk management and advisory services. Through its network of specialized operating companies, the firm partners with businesses and individuals to help manage risk, protect assets and support long-term growth. Brokers Holding Group combines deep industry expertise with a client-first approach to provide tailored strategies in an increasingly complex marketplace.

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Warner Pacific Appoints Edward Lehman as Chief Executive Officer to Lead Next Phase of National Growth

WESTLAKE VILLAGE, Calif.--(BUSINESS WIRE)--Warner Pacific, a leading national general agency and one of the fastest-growing distributors of employee benefits in the United States, today announced the appointment of Ed Lehman as Chief Executive Officer. Lehman will...

Warner Pacific Completes Acquisition of Local Insurance Advisors

WESTLAKE VILLAGE, Calif.--(BUSINESS WIRE)--Warner Pacific, a trusted national General Agency for brokers nationwide, today announced it has completed the acquisition of Local Insurance Advisors ("LIA"), a leading individual Medicare and health insurance advisory firm...

Warner Pacific Completes Acquisition of Black, Gould & Associates Inc.

WESTLAKE VILLAGE, Calif.--(BUSINESS WIRE)--Warner Pacific, a trusted national General Agency for brokers nationwide, today announced that it has successfully acquired Black, Gould & Associates Inc. ("BGA"), a full-service general agency that offers complete back-office...

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