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Oakbridge Insurance Partners with Larry S. Helms & Associates to Strengthen Specialty Expertise in the Charlotte Region

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The partnership expands high-value commercial and personal capabilities while preserving local leadership and client continuity.

ALPHARETTA, Ga.--(BUSINESS WIRE)--Oakbridge Insurance Agency LLC, a U.S. Top 50 independent insurance brokerage, today announced its partnership with Larry S. Helms & Associates Insurance Services, a respected commercial and personal lines insurance firm serving the greater Charlotte, North Carolina market. The partnership brings together Larry S. Helms & Associates' deep local expertise with Oakbridge's national specialty resources, enhancing capabilities for clients while maintaining the firm's established leadership and personalized approach.

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"The Charlotte metropolitan area continues to experience significant growth, attracting families and businesses from across the country," said Robbie Smith, Executive Chairman of Oakbridge. "Larry S. Helms & Associates has earned strong market credibility by approaching complex personal and commercial risk with discipline and consistency. Our role as a partner is to support that strength, bringing added depth, specialty collaboration, and carrier access so they can continue to serve clients at the highest level as the market evolves."

For decades, Larry S. Helms & Associates has guided clients through intricate coverage needs, developing expertise in specialty areas such as construction and collector vehicles. The firm has built one of the largest Hagerty portfolios focused on high-valued collector automobiles in the region, underscoring its technical rigor and commitment to precision.

"As underwriting becomes more selective across the industry, agencies with defined expertise and strong carrier alignment are best positioned to protect their clients," said Matt James, Chief Executive Officer of Oakbridge. "The partnership with Helms reflects our shared belief in disciplined risk management, thoughtful preparation, and long-term responsibility. It's an investment in teams that have proven they can navigate complexity with consistency."

From Helms' perspective, the partnership is designed to expand opportunities without compromising accountability or local presence. "Our clients depend on us to anticipate market shifts and structure insurance programs that endure," said Steven Helms, Principal of Larry S. Helms & Associates. "Partnering with Oakbridge enhances our ability to negotiate effectively, access broader specialty insight, and collaborate with like-minded professionals, while keeping leadership, relationships, and responsibility rooted right here in the Charlotte area."

The firm will continue to operate with the same leadership team and client-facing advisors, ensuring continuity in service and trusted relationships. Clients will benefit from expanded access to specialty resources, national carrier relationships, and collaborative expertise across Oakbridge's platform.

Built on a shared philosophy of preparation, responsibility, and client advocacy, the partnership strengthens what both firms already do best; ensuring that clients remain well-served as market conditions, underwriting standards, and risk profiles continue to change.

About Oakbridge Insurance

Oakbridge Insurance is a Top 50 U.S. insurance brokerage with deep specialty and niche market expertise. Backed by a people-first, employee-owned culture and powered by a unique regional governance model, Oakbridge delivers customized property & casualty, employee benefits, and specialty solutions across industries. Learn more at oakbridgeinsurance.com.

About Larry S. Helms & Associates Insurance Services

Larry S. Helms & Associates is an independent insurance agency headquartered in Indian Trail, North Carolina, serving clients throughout the greater Charlotte region. The firm specializes in high-value personal insurance, including collector and specialty automobiles, and maintains one of the largest Hagerty portfolios in the area. In addition to personal lines, Helms advises construction and land development clients on property and casualty programs tailored to their individual needs. Learn more at larryhelms.com.

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