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Oakbridge Partners with Valentine Insurance to Expand Integrated Risk Management and Benefits Expertise

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The partnership strengthens coordinated property & casualty and employee benefits advisory across Memphis and Nashville, while preserving local leadership and client relationships.

ALPHARAETTA, Ga.--(BUSINESS WIRE)--Oakbridge Insurance Agency LLC, a U.S. Top 50 independent insurance brokerage, today announced a partnership with Valentine Insurance, a Memphis-based firm recognized for its disciplined approach to complex property and casualty insurance and workforce advisory.

Valentine Insurance has built its firm with deliberate balance and strategic clarity. Approximately half of its business centers on property and casualty insurance, while the other half focuses on employee benefits, an intentional structure designed to help clients manage operational risk and workforce strategy in a coordinated way. As today's business challenges increasingly cut across coverage categories, Valentine's integrated advisory model reflects the reality that property exposure, liability management, and employee strategy are deeply interconnected and best addressed together.

The firm maintains significant expertise across several demanding sectors. Its habitational practice supports large property management portfolios and multifamily operations where insurance strategy must align tightly with operational and financial realities. Valentine also serves hospitality owners and operators navigating changing liability standards, fluctuating property valuations, and ongoing labor pressures. Additionally, they've developed expertise in open lot

insurance, an underwriting-intensive coverage protecting automobile inventory while vehicles are on dealership lots.

"In today's volatile property and labor markets, providing business owners insights into valuation, retention, and coverage structure influence nearly every aspect of capital allocation and workforce planning," said Matt James, CEO of Oakbridge. "Valentine has built its approach around pairing deep expertise in complex property and casualty risk with integrated benefits strategy so clients can make coordinated, long-term decisions. This level of alignment is rare, and it's exactly what we look for in a partner."

For Oakbridge, the partnership reflects its disciplined growth strategy: expanding in markets where strong local leadership, defined specialties, and thoughtful advisory models are already in place. For Valentine, the partnership provides long-term stability and access to expanded resources, without compromising the relationships, accountability, or independence that have defined the firm's success.

Clients will continue to work with the same trusted advisors, now supported by Oakbridge's broader regional and national capabilities, specialty collaboration, and carrier relationships.

"This partnership is about preserving the standards Valentine has established while expanding the resources behind it," said Robbie Smith, Executive Chairman of Oakbridge. "As property markets tighten and workforce pressures evolve, clients need deeper perspective, stronger market access, and more coordinated guidance. Growth only matters if it improves outcomes, and this partnership is designed to improve outcomes for our clients."

"Our clients expect us to understand their business, not just place their coverage," said Henry Lindeman, CEO of Valentine Insurance. "Whether we're advising a property management group, a hospitality operator, or an auto dealership, the stakes are real. Partnering with Oakbridge gives us additional specialty resources and carrier access that strengthen our ability to advocate for clients, while keeping our expertise, decision-making, and accountability local."

As property markets grow more complex and workforce dynamics continue to reshape operating models, the need for coordinated risk and benefits strategy is only increasing. Together, Oakbridge and Valentine are well positioned to meet that complexity with greater depth, broader collaboration, and an advisory model built for long-term performance.

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 equity-driven 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 Valentine Insurance

Valentine Insurance is an independent insurance firm headquartered in Memphis, Tennessee, with a satellite office in Nashville. The firm provides property & casualty and employee benefits solutions across West Tennessee and the Mid-South, with recognized expertise in habitational, hospitality, and dealer open lot insurance.

Learn more at **valentine.insure**.

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