

LIFE/HEALTH INSURANCE AGENCIES AND BROKERAGES

Ranked by number of local full-time employees as of March 1, 2008

Rank (last year)	Company Address Web site	Telephone Fax	Local full-time employees: 2008 2007 % change (loss)	Local 2007: Revenues Premium volume \$ Millions	Percentage of premium volume: Life Health/accident Annuities	Specialty services	Parent company Headquarters	Local executive Title(s)	Year established locally
1 (1)	Barney & Barney LLC ⁽¹⁾ 9171 Towne Centre Drive, #500, San Diego 92122 www.barneyandbarney.com	(858) 457-3414 (858) 909-9729	81 80 1	na \$494.3	1 99 0	Group and individual health, dental, vision, life, disability, retirement and personal planning	Barney & Barney LLC San Diego	Paul Hering managing principal	1909
2 (NR)	UnionBanc Insurance Services Inc. ⁽²⁾ 750 B St., #2400, San Diego 92101 www.uboc.com	(619) 231-1010 (619) 236-9134	43 na na	\$12.8 na	na ⁽³⁾ na na	Construction, transportation and nonprofit	Union Bank of California San Francisco	William Sanders managing principal	1891
3 (5)	Intercare Insurance Solutions Inc. 5375 Mira Sorrento Place, #550, San Diego 92121 www.intercaresolutions.com	(858) 794-4011 (858) 794-9492	39 30 30	\$6.9 \$138.0	3 93 4	Design, implementation and monitoring of employee benefit plans, retirement plans, workers' compensation and property liability programs	Intercare Holdings Inc. San Diego	Michael Barone president	2003
4 (4)	Mercer 4445 Eastgate Mall, #300, San Diego 92121 www.mercer.com	(858) 552-4290 (858) 552-3899	29 31 (6)	na na	na na na	Benefit strategy, financial analysis, renewal analysis, pension and compensation consulting	Marsh & McLennan Cos. New York	Sherri Harrison market business leader	1967
5 (3)	Alliant Insurance Services Inc. 701 B St., San Diego 92101 www.alliantinsurance.com	(619) 238-1828 (619) 699-1323	23 34 (32)	\$6.3 \$111.4	2 97 1	Employee benefit products, property and casualty insurance and workers' compensation coverage	Alliant Holdings I LLC Newport Beach	Mike Simmons chief integration officer	1925
6 (7)	Dunhill Marketing & Insurance Services Inc. 2341 Fifth Ave., San Diego 92101 www.dunhillinsurance.com	(619) 578-7800 (619) 579-7819	22 22 0	\$6.1 \$213.0	50 0 50	Life insurance, annuities, estate planning, long-term care, disability and impaired risk life insurance	Dunhill Marketing & Insurance Services Inc. San Diego	Tony Steigerwald president	1992
6 (8)	Westland Insurance Brokers 3838 Camino del Rio N., #315, San Diego 92108 www.westlandib.com	(619) 584-6400 (619) 584-6425	22 22 0	na na	10 90 0	Self-funded EE benefit plans, health savings accounts, 401(k), dental, life, disability and employer assistance plans	Westland Insurance Brokers San Diego	James Sim president	1977
8 (11)	ISN Network 1525 Faraday Ave., #180, Carlsbad 92008 www.teamisn.com	(800) 338-1892 (760) 930-9495	18 14 29	\$5.0 \$270.0	23 0 77	Synergy systems back-office support	ISN Network Carlsbad	Jeffrey Berson president	1984
9 (12)	Lockton Benefits 4275 Executive Square, #600, La Jolla 92037 www.lockton.com	(858) 587-3100 (858) 939-3100	15 14 7	\$3.5 \$110.0	3 97 0	Wellness coordination and plan management, alternative finance, claims management and voluntary benefits	Lockton Cos. Kansas City, Mo.	Lissa Thomson senior vice president, practice leader	2002
10 (15)	Marrs Maddocks & Associates Insurance Services 1903 Wright Place, #280, Carlsbad 92008 www.mmains.com	(760) 804-0402 (760) 804-0942	13 10 30	na na	20 80 0	Life insurance, health insurance, employee benefits and related products	Marrs Maddocks & Associates Insurance Services Carlsbad	Neal Stehly vice president of the benefits division	1991
11 (13)	FAS-EBA Insurance Services 2262 Carmel Valley Road, Del Mar 92014 www.fas-eba.com	(858) 792-1400 (858) 792-7985	12 12 0	na \$180.2	10 80 10	Design, implementation and monitoring of employee benefit plans, 401(k), medical, dental, life, long-term care and executive plans	FAS-EBA Insurance Services San Diego	Thomas Freismuth president	1987
12 (14)	Teague Financial Insurance Services Inc. 4700 Spring St., La Mesa 91941 www.teaguefs.com	(619) 668-5200 (619) 469-9203	11 11 0	na na	20 70 10	Medical, dental, life and disability insurance, claim resolution, benefit analysis, employee benefits and long-term care	Teague Financial Insurance Services Inc. La Mesa	Jean Strouf president	1986
13 (17)	Murria & Frick Insurance Agency Inc. 380 Stevens Ave., Solana Beach 92075 www.murriafrick.com	(858) 259-5800 (858) 259-6069	8 8 0	na na	8 92 0	Employee benefit programs, medical, dental, disability, pension	Leavitt Group Solana Beach	Raymond Sutton principal	1986
14 (20)	WSP Corporate Benefits & Insurance Services Inc. 5650 El Camino Real, #207, Carlsbad 92008 www.wspinsurance.net	(760) 931-0550 (760) 931-0551	8 7 14	na na	10 90 0	Group medical, dental, life and AD&D, vision, short-term and long-term disability, section 125 plans	WSP Corporate Benefits & Insurance Services Inc. Carlsbad	Scott Pieratt president	2005
15 (NR)	ELT Insurance Services 16835 W. Bernardo Drive, #212, San Diego 92127 www.eltinsurance.com	(858) 304-3000 (858) 753-0091	8 5 60	\$0.0 \$22.0	5 90 5	Customized benefit solutions via pro-active client partnerships	San Diego	Ed Lee president, CEO	2001
16 (21)	Morrison Insurance Services Inc. 7220 Avenida Encinas, #208, Carlsbad 92011 www.misbenefits.com	(760) 438-9311 (760) 438-9355	6 6 0	na \$24.0	15 85 0	Health insurance and employee benefits	James M. Morrison Insurance Services Inc. Carlsbad	Jim Morrison president	2002
17 (19)	California Corporate Benefits Insurance Services 16955 Via del Campo, #100, San Diego 92127 www.cabenefits.com	(858) 753-4102 (858) 487-2913	5 7 (29)	\$0.0 \$39.0	2 81 17	Health and welfare benefits, retirement and cafeteria plans, fee-based financial planning, asset management	California Corporate Benefits Insurance Services San Diego	Robert Recchia president	1986
18 (23)	Cavignac & Associates 450 B St., #1800, San Diego 92101 www.cavignac.com	(619) 234-6848 (619) 234-8601	4 3 33	\$0.8 \$14.0	2 98 0	Risk-reduction services	Cavignac & Associates San Diego	Jeffrey Cavignac president	1992
19 (NR)	Blue Summit Financial Group 9001 Grossmont Blvd, San Diego 91941 www.bluesummitinvest.com	(619) 698-4330 (619) 698-0430	3 3 0	na na	2 0 10	Socially Responsible Investing	na		1994

In case of a tie, companies are ranked by 2007 full-time employees, then alphabetically. **wnd** Would not disclose **na** Not available **NA** Not applicable **(NR)** Not ranked **Notes:** CBIZ, No. 2 on last year's list; G.S. Levine Insurance Services Inc., No. 9 on last year's list; Nico Insurance Services, No. 10 on last year's list; William J. King & Associates Insurance Services Inc., No. 16 on last year's list; ABD Insurance & Financial Services, No. 18 on last year's list; SFG Benefits Insurance Services Inc., No. 22 on last year's list; and Maguire Health Insurance Services, No. 24 on last year's list, did not return surveys. **Sources:** The agencies and Employment Development Department filings. It is not the intent of this list to endorse the participants nor to imply a company's size or numerical

rank indicates its quality.

(1) Barney & Barney LLC announced Jan. 24, 2008, that it will merge with Saylor & Hill Co.

(2) Formerly known as John Burnham Insurance Services, No. 6 on last year's list.

(3) Life, health and annuities account for 28 percent of the total gross.

Researched by Kevin Black