

LIFE/HEALTH INSURANCE AGENCIES AND BROKERAGES

Ranked by number of local full-time employees as of March 1, 2009

Rank (last year)	Company Address Web site	Telephone Fax	Local full-time employees: •2009 •2008 •% change (loss)	Local 2008: \$ Millions •Revenues •Premium volume	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 9171 Towne Centre Drive, #500, San Diego 92122 www.barneyandbarney.com	(858) 550-4966 (858) 909-9729	80 81 (1)	na \$520.0	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)	CBIZ Benefits and Insurance Services Inc. 10616 Scripps Summit Court, #250, San Diego 92131 www.cbiz.com	(858) 795-2000 (858) 795-7460	73 68 7	na na	40 55 5	Consolidated billing and Cobra administration	CBIZ Inc. Cleveland	Douglas J. Gwilliam president	1976
3 (3)	Intercare Insurance Solutions Inc. 5375 Mira Sorrento Place, #550, San Diego 92121 www.intercaresolutions.com	(858) 373-6900 (858) 373-6897	44 39 13	\$8.1 na	2 95 3	Design, implementation and monitoring of employee benefit plans, retirement plans, workers' compensation and property liability programs	Intercare Insurance Solutions 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	25 29 (14)	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 (5)	Alliant Insurance Services Inc. 701 B St., San Diego 92101 www.alliantinsurance.com	(619) 238-1828 (619) 699-1323	23 23 0	na na	2 97 1	Employee benefit products, property and casualty insurance and workers' compensation coverage	Alliant Holdings I LLC Newport Beach	Jim Castle president, Alliant Commercial Group	1925
6 (NR)	G.S. Levine Insurance Services Inc. 10505 Sorrento Valley Road, #200, San Diego 92121 www.gslevineins.com	(858) 523-7500 (858) 481-7953	21 22 (5)	na \$45.0	5 95 0	na	G.S. Levine Insurance Services Inc. San Diego	Gary Levine president, CEO	1992
7 (NR)	BB&T - John Burnham Insurance Services⁽¹⁾ 750 B St., #2400, San Diego 92101 www.insurance.bbt.com	(619) 231-1010 (619) 236-9134	20 20 0	\$5.0 \$100.0	4 95 1	Design and implementation of employer sponsored benefit programs, funding strategies, wellness programs and retirement benefits	BB&T Insurance Services North Carolina	Jim Bayne area president	1891
8 (8)	Lockton Benefits 4275 Executive Square, #600, La Jolla 92037 www.lockton.com	(858) 587-3100 (858) 939-3100	18 15 20	na na	3 97 0	Health risk management/wellness coordination, plan modeling and management, alternative finance, claims management and voluntary benefits, compliance, clinical and actuarial support	Lockton Cos. Kansas City, Mo.	Lissa Thomson senior vice president, practice leader	2002
9 (7)	ISN Network 1525 Faraday Ave., #180, Carlsbad 92008 www.teamisn.com	(800) 338-1892 (760) 930-9495	17 18 (6)	\$3.5 \$210.0	50 0 50	Synergy systems back-office support	ISN Network Carlsbad	Jeffrey Berson president	1984
10 (6)	Dunhill Marketing & Insurance Services Inc. 2341 Fifth Ave., San Diego 92101 www.dunhillinsurance.com	(619) 578-7800 (619) 579-7819	17 22 (23)	\$5.1 \$16.0	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
11 (9)	Marrs Maddocks & Associates Insurance Services 1903 Wright Place, #280, Carlsbad 92008 www.mmains.com	(760) 804-0402 (760) 804-0942	14 13 8	na na	10 90 0	Life insurance, health insurance, employee benefits and related products	Marrs Maddocks & Associates Insurance Services Carlsbad	Neal Stehly vice president, Benefits Division	1991
12 (10)	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 \$197.6	10 79 11	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
13 (11)	Teague Financial Insurance Services Inc. 4700 Spring St., La Mesa 91941 www.teaguefs.com	(619) 668-5200 (619) 469-9203	12 11 9	na \$18.0	15 75 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
14 (14)	ELT Insurance Services 16835 W. Bernardo Drive, #212, San Diego 92127 www.eltinsurance.com	(858) 304-3000 (858) 753-0091	10 8 25	na \$30.0	15 80 5	Customized benefit solutions via proactive client partnerships	ELT Insurance Services San Diego	Ed B. Lee president, CEO	2001
15 (12)	Murria & Frick Insurance Agency Inc. 380 Stevens Ave., Solana Beach 92075 www.murriafrick.com	(858) 259-5800 (858) 259-6069	9 8 13	na na	8 92 0	Employee benefit programs, medical, dental, disability, pension, human resource services	Leavitt Group Solana Beach	Scott Tucker agency manager	1986
16 (13)	WSP Corporate Benefits & Insurance Services Inc. 5650 El Camino Real, #207, Carlsbad 92008 www.wspinsurance.net	(760) 931-0550 (760) 931-0551	8 8 0	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, CEO	2005
17 (15)	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
18 (16)	California Corporate Benefits Insurance Services 16955 Via del Campo, #100, San Diego 92127 www.cabenefits.com	(858) 753-4102 (858) 487-2913	5 5 0	na \$38.0	2 80 18	Employee benefits firm specializing in group insurance, including self-funding and managed care, and cafeteria, voluntary and retirement plans	California Corporate Benefits Insurance Services San Diego	Robert Recchia president	1986
19 (17)	Cavignac & Associates 450 B St., #1800, San Diego 92101 www.cavignac.com	(619) 234-6848 (619) 234-8601	4 4 0	na na	2 98 0	Risk-reduction services	Cavignac & Associates San Diego	Jeffrey Cavignac president	1992
20 (NR)	SFG Benefits Insurance Services Inc. 4275 Executive Square, #400, La Jolla 92037 www.sfgbenefits.com	(858) 202-2376 (858) 558-5903	3 3 0	na na	0 100 0	na	SFG Benefits Insurance Services Inc. San Diego	John Kahle president	1995
21 (NR)	Maguire Health Insurance Services 3255 Moccasin Ave., San Diego 92117 www.maguireinsuranceservices.com	(858) 273-4440 (858) 273-8111	2 2 0	na na	10 90 0	Individual and small group life insurance, dental insurance	Maguire Health Insurance Services San Diego	Arlene Maguire partner	1993
22 (19)	Vanorsdale Insurance Services 4909 Murphy Canyon Road, #510, San Diego 92123 www.vanorsdale.com	(858) 541-2900 (858) 541-2901	2 2 0	na na	4 90 0 ⁽²⁾	na	Vanorsdale Insurance Services San Diego	Douglas Galloway president	1947

In case of a tie, agencies are ranked by premium volume, then alphabetically.

na Not available

(NR) Not ranked

Notes: Blue Summit Financial Group, No. 18 last year, did not return a survey.

Sources: The agencies and Employment Development Department filings.

It is not the intent of this list to endorse the participants nor to imply an agency's size or numerical rank indicates its quality.

⁽¹⁾ Listed last year as UnionBanc Insurance Services Inc., No. 2 on last year's list.

⁽²⁾ 6% other.

Researched by Kevin Black and Andrew Schweizer