

SAN FRANCISCO BUSINESS TIMES

THE LIST

LARGEST BAY AREA BENEFITS CONSULTING FIRMS

RANKED BY BAY AREA CONSULTANTS

Business name/Prior rank	Address	Bay Area consultants	Bay Area staff	Companywide consultants	Sample of services	Top local employee benefits executive(s)
Website	Phone					
1 EPIC Insurance Brokers & Consultants ① <i>epicbrokers.com</i>	425 California St. 24th Fl. San Francisco, CA 94104 415-356-3900	265	310	300	Employee benefits brokerage and consulting, executive and voluntary benefits, global benefits	John Connell, President, Western region employee benefits
2 ABD Insurance & Financial Services Inc. ③ <i>theadteam.com</i>	777 Mariners Island Blvd. #250 San Mateo, CA 94404 650-488-8565	93	93	140	Strategic benefit planning, global benefits, compliance, wellness consulting, 401(k) consulting	Darren Brown, EVP
3 Alliant Insurance Services Inc. ¹ ④ <i>alliant.com</i>	100 Pine St. 11th Fl. San Francisco, CA 94111 415-403-1400	60	104	590	Benefits management, ancillary benefits support, employee engagement/support, other benefits-related financial/business services	Bret Goodman, EVP/ Managing director
4 Hub International Insurance Services ⑦ <i>california.hubinternational.com</i>	3000 Executive Pkwy. #300 San Ramon, CA 94583 925-866-7050	60	70	NR	Employee benefits consulting, HR and administration outsourcing, health management services, compliance support, 401(k)	Bryan Costello, President, Bay Area Jim Vawter, EVP, Bay Area
5 Segal Group ² ⑥ <i>segalco.com</i>	180 Howard St. #1100 San Francisco, CA 94105 415-263-8200	59	77	NR	Comprehensive health and retirement benefits and human resources consulting services	Fred Herberich, SVP/benefits consultant
6 Milliman Inc. ⑧ <i>milliman.com</i>	650 California St. 21st Fl. San Francisco, CA 94108 415-403-1333	45	72	1,594	Pension, health and welfare, 401(k), workers' compensation	Rich Wright, Principal
7 Brown and Brown Insurance of Northern California Inc. ⑤ <i>bbnca.com</i>	3697 Mt. Diablo Blvd. #100 Lafayette, CA 94549 800-733-3131	40	45	2,000	Employee benefits, executive benefits, voluntary benefits, claims analysis, benefits administration, communications and advocacy	Matthew Sitzmann, EVP/ Profit center leader
8 Lockton Insurance Brokers LLC ⑨ <i>lockton.com</i>	3 Embarcadero Ctr. 6th Fl. San Francisco, CA 94111 415-568-4000	37	95	1,414	Employee benefits, retirement services, property and casualty	Bob Irvin, President
9 Woodruff Sawyer ② <i>woodruffawyer.com</i>	50 California St. 12th Fl. San Francisco, CA 94111 415-391-2141	35	53	NR	Employee benefits, risk management, insurance	Joelle Margolin, Northern California benefits practice leader
10 Arthur J. Gallagher & Co. ⑩ <i>ajg.com</i>	1255 Battery St. #450 San Francisco, CA 94111 415-546-9300	34	64	NR	Health, well-being, engagement, PBM management, HR and benefits technology, HR and compensation, voluntary and multinational	Bruce Caldwell, Area president
11 Sequoia Consulting Group ⑪ <i>sequoia.com</i>	1850 Gateway Dr. #700 San Mateo, CA 94404 650-369-0200	26	270	37	Employee benefits, 401(k), risk management, global services, compliance, well-being, HR outsourcing	Greg Golub, CEO
12 NFP ⑫ <i>nfp.com</i>	3470 Mt. Diablo Blvd. #A100 Lafayette, CA 94549 925-254-7100	25	100	2,500	Corporate benefits, commercial insurance, private client resources, retirement plan services, HR services, wellness, health analytics	John Hohman, Regional president, West
13 USI Insurance Services ⑬ <i>usi.com</i>	201 Mission St. #1100 San Francisco, CA 94105 628-201-9001	25	25	1,000	Population health/well-being, underwriting, pharmacy, compliance, communications and HR technology solutions	Jeff Bahrenburg, EVP
14 McGriff Insurance Services ⑭ <i>mcgriffinsurance.com</i>	4480 Willow Rd. Pleasanton, CA 94588 925-463-9672	24	65	205	Health and welfare and retirement consulting, population health consulting, outsourcing and administration	John Cranston, Karen Reid, Area presidents
15 Keenan ⑮ <i>keenan.com</i>	1111 Broadway #2000 Oakland, CA 94607 510-986-6750	19	50	55	Benefits consulting, online benefits administration, retirement	John Scatterday, SVP/public agency employee benefits practice leader
16 Heffernan Insurance Brokers ⑯ <i>heffins.com</i>	1350 Carlbak Ave. Walnut Creek, CA 94596 925-934-8500	16	41	30	Benefit consulting, integrated technology, alternative financing modes	F. Michael Heffernan, President/CEO
17 OneDigital Health & Benefits ⑰ <i>onedigital.com</i>	19200 Stevens Creek Blvd. #210 Cupertino, CA 95014 650-397-5124	15	75	NR	Employee benefits consulting, global benefits, HR consulting, executive benefits	Jeff Fallick, Regional managing principal
18 Marsh & McLennan Insurance Agency LLC ⑱ <i>marshmma.com</i>	1340 Treat Blvd. #250 Walnut Creek, CA 94597 925-482-9300	14	47	NR	Employee health and benefits, retirement services, actuarial, private client	Jeff Calder, Principal/ Managing director, Bay Area
19 Mercer Health & Benefits LLC ⑲ <i>merc.com</i>	4 Embarcadero Ctr. #1100 San Francisco, CA 94111 415-743-8700	12	96	NR	Benefits consulting, benefits outsourcing, human capital consulting	Scott Grenn, Partner/ Northern California health business leader
20 Jackson Square Financial ⑳ <i>jsfin.com</i>	48 Gold St. San Francisco, CA 94133 415-217-7900	9	12	NR	Retirement plans, health, dental, vision, disability, life, commuter, college loan repayment, education funding, FSA	Graham Green, Principal
21 Relation Insurance Services ㉑ <i>relationinsurance.com</i>	1277 Treat Blvd. #400 Walnut Creek, CA 94597 800-404-4969	8	20	26	Employee benefits consulting, employee benefits administration, retirement services	Keri Lopez, President, employee benefits
22 Risk Strategies ㉒ <i>risk-strategies.com</i>	700 Airport Blvd. #300 Burlingame, CA 94010 650-762-0400	7	15	75	Personal, commercial and employee benefits	Dawn Calvert, West region employee benefits practice leader Pamela Lauper, Managing director
23 Advanced Estate & Insurance Services (AEIS) ㉓ <i>aeisadvisors.com</i>	306 6th Ave. #B San Mateo, CA 94401 650-348-6234	4	12	4	Strategic planning and employee benefits, compliance consulting, HR consulting and outsourcing	Ronald Bland, President

¹ Benefits website: alliantbenefits.com.

² Figures reflect estimates based on last year's List.