



BenefitMall at a Glance:

- CEO: Scott Kirksey
- CFO: Stephanie Bowman
- CIO: Michelle Sheffield
- President: Bob Love
- Headquarters: Dallas, Texas
- Year Established: 1979
- Private: The Carlyle Group
- Number of employees: 900+
- Number of offices: 24
- Website: www.benefitmall.com
- Twitter: <https://twitter.com/BenefitMall>
- LinkedIn: www.linkedin.com/company/benefitmall
- Facebook: www.facebook.com/BenefitMall
- Contact us: 888-338-6293

About BenefitMall:

Headquartered in Dallas, BenefitMall partners with a network of 20,000 Brokers to deliver employee benefits to more than 140,000 small and medium-sized businesses. With a dedicated focus on the broker community, BenefitMall leverages innovative technology backed by human expertise to provide the very best in broker services nationwide. Through a network of brokers and carriers, BenefitMall delivers efficient, secure, digital benefits solutions.

Owned by Management and The Carlyle Group, BenefitMall also operates HealthCareExchange.com, the leading online community for health care reform and compliance. More information is available at www.benefitmall.com.

Mission:

To provide the fastest, easiest and most trusted benefits selling experience.

Vision:

To empower brokers & consumers, protected by easy access to secure benefits solutions.

Values:

- Collaborate to win
- Innovate to simplify
- Have the courage to grow
- Earn trust with every engagement
- Co-create a culture of inclusion

Other Interesting Facts:

- Largest General Agency in the U.S.
- Partners with 20,000 brokers who serve more than 140,000 businesses, primarily SMBs, nationwide.
- Maintains relationships with more than 120 carrier partners that offer products ranging from core medical to ancillary & voluntary products, such as dental, life, vision, disability, and long-term care.
- Operates HealthcareExchange.com, the largest online community for healthcare reform.
- Maintains ~\$7 billion annualized, in-force premiums
- Sold more than \$1.3 billion annualized in new coverage in 2020

Corporate History:

For more than four decades, BenefitMall has been dedicated to serving the needs of Brokers. Our success has been a result of exceeding customer's expectations and constant progressive growth over the last decade. Here is a brief look at our history:

Today	Headquartered in Dallas, Texas with more than 900 employees across the country.
2020	BenefitMall makes the strategic decision to exit the payroll business to focus on growing its benefits division.
2019:	BenefitMall launches Agency Workspace and Online Enrollment providing a simple, secure way for brokers to manage and submit business to BenefitMall. BenefitMall acquires Brown & Brown of Pennsylvania's GA Entity.
2018:	Scott Kirksey named CEO. BenefitMall acquires two general agencies – FILCO and Slattery GA. BenefitMall acquires Planet Payroll.
2017:	Global alternative asset manager, The Carlyle Group acquires BenefitMall
2015:	BenefitMall launches PayFocus – an online payroll and HR solution designed specifically for small and mid-size businesses.
2013:	BenefitMall launches new company brand to consolidate its benefits business with the payroll services of CompuPay. With the tagline "All Together, Better", BenefitMall is now the nation's largest provider of health benefits and payroll solutions.
2012:	Merges with CompuPay creating the leading national provider of integrated employee benefits and payroll solutions.
2011:	Releases a new Broker Workspace where brokers can view the status of their cases, access exclusive quoting tools, search for documents, and much more.

2010:	Launches BenefitMall Individual Exchange, an online solution designed to help Brokers manage their individual business. BenefitMall acquires NAS Financial Services in Morristown, NJ.
2008:	BenefitMall acquires BenefitPort Southwest, a full-service General Agency with a division specializing in Senior Products.
2006:	BenefitMall acquires Comrisk Insurance, a full-service General Agency specializing in stop loss insurance. BenefitMall acquires Weston Group Benefits, LLC in the northeast. BenefitMall acquires BenefitPort Southeast that services agents throughout the state of Florida. BenefitMall partners with Allied Capital Corporation, the largest business development corporation in the U.S.
2001-2004:	BenefitMall acquires Colorado Group Services, a full-service General Agency. BenefitMall acquires Group One Source, a national employee benefits marketing organization.
2000:	BenefitMall launches a completely re-tooled website providing broader applications and easier access for Brokers. BenefitMall acquires two units of The Mather Companies, one of the largest General Agencies and third-party administrators of employee benefits on the east coast.
1999:	Centerstone Insurance and Financial Services separates from Humana and evolves into an independent, stand-alone company. The company is renamed BenefitMall to better represent the total employee benefit products available to Brokers. Acquires several companies, establishing office locations in Georgia, Florida, and New Jersey.
1998:	Becomes incorporated in Delaware as Centerstone Holding Corporation with CIFS as a subsidiary.
1997:	Centerstone launches the first online insurance quote engine.
1995:	Humana acquires Emphesys and its related affiliates, including Centerstone Insurance and Financial Services.
1994:	Employers Health Insurance Company (EHI) of Green Bay, Wisconsin acquires Centerstone Insurance and Financial Services.
1993:	West Coast becomes Centerstone Insurance and Financial Services after a series of acquisitions.
1991:	West Coast acquires a General Agency in California called Multiple Services, Inc.
1985:	West Coast launches the first software application capable of producing multi-carrier quotes in real time – an industry breakthrough from brokers.

1979:

West Coast Insurance Marketing Corporation is founded in California by a group of insurance professionals.

Media Contact Information

If you are a member of the press and you have a specific inquiry, please send your requests to:

Jennifer Powell
The Power Group
972.567.3937
jennifer@thepowergroup.com