

LEADERS OF INFLUENCE INSURANCE



Insurance Brokers You Should Know in Orange County

Presented by



2023 LEADERS OF INFLUENCE - INSURANCE

**MARK ANELLI**

SR. RISK ADVISOR, REGIONAL VP OF SOUTHERN CA, SHAREHOLDER

Mark Anelli was recruited to Morris & Garritano in 2008. He is a distinguished professional who demonstrates a strong expertise in a variety of industry specializations with an advanced knowledge of the evolving insurance landscape.

Serving as an advisor and practice leader, Anelli is driven by the opportunity to develop meaningful relationships with his clients where he can learn about their business, understand the challenges, and find solutions that work. Currently heading up M&G's agency presence in Orange County, Anelli has spent time living and working in various cities across the US while playing for the NFL.



With deep commitment to his community, Anelli's volunteer and organizational involvements include fundraising work with the National MS Society and serving as President of the Board of Directors for SknVue. Additionally, Anelli stays active as the Head Coach for Newport Beach Seahawks Youth Football.

Anelli attributes his greatest role in life to being a husband and a father. He enjoys spending time with his wife and three sons sharing a meal together, watching a good movie, or playing in any competitive game, sport, or activity.

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www.linkedin.com/company/morris-&-garritano

**CHRIS BARTLETT**

DIRECTOR OF SALES, EMPLOYEE HEALTH & BENEFITS DIVISION | CA INSURANCE LICENSE #0H48237

Chris Bartlett, as the director of sales for Marsh McLennan Agency's (MMA) Employee Health & Benefits Division, is a seasoned professional who joined the team in 2023. Bartlett plays a pivotal role in overseeing the sales team, focusing on growth strategies, producer development, fostering carrier partnerships, and enhancing industry knowledge. He collaborates with various teams within MMA to ensure the effective execution of sales initiatives, all while maintaining a strong commitment to placing the best interests of clients at the forefront.

Prior to MMA, Bartlett dedicated 12 years of production and sales leadership to other firms within the employee health and benefits space after beginning his career in insurance as an account coordinator on the property & casualty side.

Bartlett holds a bachelor's degree in Business Administration with a minor in Spanish, earned from Chapman University. His extensive career and multi-faceted experiences illustrate his dedication to the insurance industry, making him a valuable asset and leader in the field of employee health and benefits.

Chris.Bartlett@MarshMMA.com /
www.linkedin.com/in/chris-bartlett-71a59633

**COCO BENNETT**

SENIOR ACCOUNT EXECUTIVE

CoCo Bennett is an Employee Benefits Senior Account Executive at Koru. CoCo is responsible for all aspects of benefits including the strategic planning, service, financial and contractual aspects of client relationships. Bennett has more than 35 years of experience in the insurance industry specializing in employee benefits. She brings a broad, deep skillset to Koru including expertise in both self-funded and fully insured benefits programs.

Prior to Koru, CoCo served as a medical claims adjuster, eventually going on to help build a third-party administrator. She has worked for Arthur J. Gallagher, USI, Venbrook, and OneDigital, where she developed her background in operations, marketing, and servicing of clients. She has been successful at negotiating large group renewals and implementing the full spectrum of employee benefits coverage. Bennett has established and implemented plans for national accounts, including clients with several hundred to thousands of employees.

Bennett holds a Group Benefits Disability Specialist (GBDS) designation. She was born and raised in California. She loves spending time with family & friends, working out, hiking, and live music.

coco@korurm.com /
www.linkedin.com/in/coco-bennett

**MICHAEL BOOS**

VICE PRESIDENT OF BUSINESS DEVELOPMENT, MBA

Michael Boos is Vice President of Business Development at Koru. With a remarkable background in Operations and Personnel, Boos brings extensive experience from his 12-year tenure in the Air Force as a mobility officer and pilot.

Boos graduated with a business degree from the United States Air Force Academy, and later completed an MBA at the Haas School of Business, University of California, Berkeley. Throughout his career, he has adeptly managed teams of varying sizes, ranging from small flight deck crews to entire unit mobilizations and deployments. Not only is he process-oriented, but he is also highly personable, making him an ideal addition to our company. While maintaining his role as a Captain at Southwest Airlines, Boos also concurrently offers risk management solutions to the business community, particularly within the aviation sector. While focusing on business development and fostering the Koru culture, Michael's greatest strength lies in building relationships.

Beyond his professional achievements, Boo's greatest source of pride and joy lies in his growing family, consisting of his wife and two young children—an energetic three-year-old son and an adorable one-year-old daughter.

mike@korurm.com /
www.linkedin.com/in/michael-boos-89a52814

**GLEN CARLSON**

SENIOR VICE PRESIDENT

Glen Carlson has been with McGriff since 2004 when he opened the firm's West Coast operations. His expertise is in developing partnerships with clients to understand their business operations and lower their total cost of risk. He focuses on understanding his clients' unique challenges – financial, operational, strategic and hazard.

The 35-year risk management veteran has extensive experience with group captives and single-parent captives. He also specializes in analyzing insurance programs, identifying inconsistencies, and identifying potential coverage gaps. He then works closely with his clients to find the proper blend of traditional insurance, self-insurance, risk transfer, and retentions to meet the individual needs of each organization.

Carlson has served as a featured speaker at numerous industry events and has been published in several trade publications. He holds the Associate in Risk Management (ARM) and Certified Insurance Counselor (CIC) designations.

gcarlson@mcgriff.com /
www.linkedin.com/in/glen-carlson-91251812

**BARRON DORF**

VICE PRESIDENT OF GROWTH

With over 25 years of industry experience, Barron Dorf, OneDigital's Vice President of Growth, is an accomplished and award-winning executive. His in-depth expertise in employee benefits and sales has propelled companies forward at all stages of growth.

Dorf's leadership strength stems from his consistent approach built around four key principles: focus, inspiration, accountability, and trust. He proactively cultivates a robust culture to help teams grow and remove roadblocks to success. Dorf mentors and provides inspiration for positive change leading to the noteworthy success of his team as new leaders. He considers developing future leaders as the biggest accomplishment in his career so far and his passion as he looks to the future.

Dorf currently leads cross-functional teams as a unified force to ensure they have the necessary resources to provide clients with solutions across all service areas, including Employee Benefits, HR Consulting, Property and Casualty, Retirement and Wealth. He deeply understands the growth process and how to execute strategic plans while innovating in complex business environments.

He has a proven track record for exceeding expectations and delivering on his promises. He is committed to building and leading talented sales teams that help clients and their employees thrive. Outside of work, Dorf dedicates his time to coaching his sons in basketball, baseball, and football and playing pickleball.

barron.dorf@onedigital.com /
www.linkedin.com/in/barron-dorf



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RONDA ECKHARDT

SENIOR VICE PRESIDENT OF CONSULTING SERVICES

Ronda Eckhardt is a Senior Vice President of Consulting Services in McGriff's Employee Benefits department.

With over 25 years of experience in employee benefits, Eckhardt is responsible for overall client management in a variety of industries, including pharmaceutical, retail, medical device, nonprofit, manufacturing and engineering, etc.



Eckhardt started her career at McGriff, previously Precept, in 1997. She currently leads a team recognized at McGriff for delivering exceptional service, sound long-term financial management strategies, and creative employee communications while exceeding her annual sales goals year after year. Her clients appreciate the tremendous value she and her team provide, alleviating much of their workload via McGriff's internal benefits administration services and managing their benefit costs below trends.

Eckhardt is a licensed California Life and Health Property & Casualty agent. She earned her bachelor's degree in business administration from the University of Colorado Boulder. She serves as a mentor for future graduates of the Leeds School of Business at the University of Colorado and as vice president of the Orange County alumnae chapter of Alpha Chi Omega.

reckhardt@mcgriff.com /
www.linkedin.com/in/rondaeckhardt

STEVE FISK, CIC, ARM, CRIS, CRM

PRINCIPAL, ORANGE COUNTY BUSINESS INSURANCE DIVISION

Steve Fisk joined Marsh McLennan Agency (MMA) in 2007 and is a Principal in the Business Insurance Division. Steve developed and co-leads the firm's Consumer Goods Practice Group. Fisk is widely recognized as an industry leader, earning the distinction of 2013, 2017, and 2023 Risk & Insurance Power Broker by the insurance industry's leading trade publication, Risk & Insurance. He was also named a 2018 and 2019 Insurance Business America Top 100 producer.



Fisk deliberately seeks out relationships across a variety of disciplines that serve the industry, including lawyers, accountants, and bankers, for example, who share a passion and focus on the industry. Through these connections, he establishes a network beyond the traditional boundaries of insurance.

Fisk's insurance career began in 2004, starting with designing and brokering risk transfer programs for complex risks. Fisk previously worked as a producer and sales manager, managing a team of 12 and supporting development of sales strategy, customer service, and industry expertise.

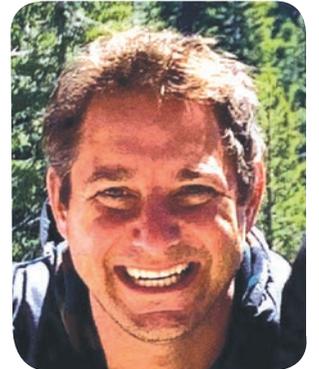
Fisk earned a BA in business at the University of Kansas. He holds the Certified Insurance Counselor (CIC), Associate in Risk Management (ARM), Construction Risk Insurance Specialist (CRIS), and the Certified Risk Manager (CRM) designations. Fisk is actively involved, and sits on the board, of several organizations including Miracles for Kids and Soul Community Planet.

Steve.Fisk@MarshMMA.com /
www.linkedin.com/in/steven-fisk-062a734

NICK GABRIEL

FOUNDING PARTNER

Nick Gabriel is a Founding Partner at Koru. He has been in the commercial insurance space for fifteen years, brokering all lines of coverage for clients of all shapes and sizes. After successful runs with The Rule Company, Integro, and EPIC, Gabriel founded Koru to infuse renewed energy into the process of providing insurance solutions to all types of companies. While Gabriel has developed an expertise in construction and real estate, his clients depend on him for all things risk management.



His tireless work ethic and industry knowledge are critical to Koru's future, as he and the team build a formidable agency that is client-focused, service-driven, ethical, collaborative, creative, and proficient. Gabriel's ultimate ambition is helping clients realize peace of mind for their unique businesses.

nick@korurm.com /
www.linkedin.com/in/nick-g-b687582a



RUSS GRAMSTAD

SENIOR MANAGING PRINCIPAL

Russ Gramstad is a Senior Managing Principal at OneDigital, the nation's leading insurance brokerage, financial services and HR consulting firm. With nearly two decades of experience in the health industry, Gramstad oversees the strategic financial, personnel, and operational facets of the Southern California market for OneDigital.

Gramstad's forward-thinking leadership has led to the continued success of the organization as a team of fierce advocates of health, wealth and financial security for clients. His extensive human resource education and experience provide clients with an unparalleled level of benefits, support, and management.

His strong commitment to building a culture of inclusion, collaboration and high performance has earned the team recognition as one of Orange County Business Journal's Best Place To Work for 13 consecutive years.

Gramstad graduated from California State University, Fullerton, where he earned a bachelor's degree in human resource management. He also holds a Certified Employee Benefit Specialist designation through the International Foundation of Employee Benefit Plans and the Wharton School of the University of Pennsylvania.

rgramstad@onedigital.com /
www.linkedin.com/in/russell-gramstad-1b091810



RITA GUILD

DIRECTOR OF EMPLOYEE & HEALTH BENEFITS,
PRINCIPAL | CA LICENSE #0A68907

Rita Guild is the director of Employee Health & Benefits at Marsh McLennan Agency in Orange County. Since joining MMA in 2014, her passion for mentorship led her to join the leadership ranks, where she saw an opportunity to grow and better serve her clients.

Guild was an integral part in guiding MMA teams through the pandemic. Her resilience and flexibility helped steer colleagues toward new ways of embracing remote work, positioning the firm for year over year strong growth.

With decades of experience in the industry, Guild has excelled as a fierce negotiator, tailoring efficient employee benefit programs, driving early adoption migrating clients toward innovation in self-funding, pharmacy savings and point solutions while easing client's administrative load.

Prior to her role at MMA, she served as the vice president of Employee Benefits at another prominent Orange County brokerage. Rita is actively involved South Coast Christian empowering women as well as supplying meals to children and families through Feed ONE/Convoy of Hope.

Rita.Guild@MarshMMA.com /
www.linkedin.com/in/rita-guild-47103b7



ERIN HOEFER

SENIOR VICE PRESIDENT

As Senior Vice President, Consulting Services at McGriff, Erin Hoefer oversees a client management team that provides employee benefits solutions for large, U.S.-based employers in the manufacturing, high tech, aerospace, and defense industries. She joined McGriff in 2010.

Hoefer and her team help clients identify innovative solutions to manage their employee benefits spend – often the second-largest line item on their P&L statements. She also helps clients identify potential vulnerabilities in their existing benefits plan and develops strategies to leverage resources and mitigate risk exposures. A 25-year veteran of the employee benefits industry, Hoefer speaks at industry events and conferences. Recent topics include:

- Corporate data driven decision-making to manage health care spend
- HSAs and consumer-directed health plans as a wealth planning tool
- Strategies for successfully integrating health plans after a merger or acquisition

Hoefer studied mathematics at DePaul University and moved to CA in 2004. She spends her free time as an equine therapy volunteer and advocates for people with special needs. Additionally, she serves on the board of the Shea Center for Therapeutic Riding.

ehoefer@mcgriff.com /
www.linkedin.com/in/erin-hoefer-eebenefits





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STACY HUBBARD

MANAGING DIRECTOR, PRINCIPAL | CA INSURANCE
LICENSE #0D96814

Stacy Hubbard is a principal and managing director for Marsh & McLennan Agency's (MMA) Orange County office, also serving as the Associate Managing Director for the Los Angeles office.

With a career spanning over 28 years, Hubbard specializes in employee benefits for both public and private sectors, encompassing fully insured and self-funded health plans. Her responsibilities encompass strategic support for clients and leadership of the OC office.



Before joining MMA, Hubbard successfully managed the client services department at another brokerage for eight years, gaining invaluable experience in delivering exceptional service and solutions to clients in the healthcare industry. Hubbard's journey in the healthcare sector further evolved during her seven-year tenure at Beech Street, a national PPO network specializing in self-funded employer groups. Here, she contributed significantly to enhancing the efficiency and effectiveness of healthcare delivery.

Beyond her professional commitments, Hubbard is actively engaged in the community as a board member for Unlimited Possibilities and volunteers for the Ronald McDonald House organization, participating in various events throughout the year. Her dedication to philanthropy mirrors her commitment to the healthcare industry and the well-being of others.

Stacy.Hubbard@MarshMMA.com /
www.linkedin.com/in/stacyhubbard



JILL KEIDEL

SENIOR ACCOUNT EXECUTIVE

Jill Keidel is a seasoned insurance pro with years of industry experience in commercial lines, with a focus on D&O and EPL. For the majority of her career, she served as account executive with Arthur Gallagher.

Her expertise includes managing diverse portfolios and providing strategic guidance for accounts such as supermarket chains, non-profits, logistics and distribution companies. She's known for cultivating strong relationships with both clients and carriers, which aligns perfectly with Koru's culture.

jill@korurm.com /
www.linkedin.com/in/jill-keidel-21931314



DOUGLAS KING, MBA

EVP, CONSULTING SERVICES, MCGRIFF EMPLOYEE BENEFITS

Douglas King has worked over 30 years in healthcare, the first two decades in leadership roles for national health plans. He joined McGriff in 2013 and currently manages self-funded clients ranging from 1,100 employees to 55,000, including McGriff parent Truist Financial Corporation, where he drives program innovation, plan management strategies and population health improvements.

Prior to joining McGriff, King managed over \$3 billion in medical premiums for Blue Shield of California as a general manager and \$1.5 billion in medical premiums as a general manager at Health Net. He also served as the president of Health Net Life Insurance and general manager of their dental and vision subsidiaries.

In addition to those leadership roles, King also has served as a chief financial officer and sales senior vice president, providing a well-rounded business perspective and understanding to benefit programs, incentive designs, and communication strategies. He earned his MBA and BSBA in business administration from Chapman University and is a licensed agent in all 50 states.

King resides with his wife of 28 years in Orange County, CA and is a proud father of two adult sons, both of whom played Division I college baseball.

douglas@mcgriff.com /
www.linkedin.com/in/douglasking23



KEVIN MAHONEY

FOUNDING PARTNER

Kevin Mahoney is a Founding Partner at Koru. He shares in Koru's passion for excellence and is aiming to deliver the best possible results for Koru's clients. Mahoney began his career with Marsh's FINPRO group focusing on Executive Liability Coverages (Directors & Officers, Employment Practices Liability, Errors & Omissions, Cyber, Crime) in the early 2000's. He then joined Aon to expand his product knowledge and client base.

After Aon, Mahoney developed a passion for the challenges of California businesses and joined the Venbrook Group to be better positioned to address the exposures of CA firms. Mahoney opened and successfully led the Orange County Venbrook office until the firm sold to private equity. He is excited to dovetail industry innovations with the needs of Koru's clients.

kevin@korurm.com /
www.linkedin.com/in/kevintimothymahoney



JOE MCKNIGHT

DIRECTOR, BUSINESS DEVELOPMENT AND LEGAL

As the leader of Koru's business development initiatives and head of the company's legal affairs, Joe McKnight brings over 20 years of experience in real estate, finance, senior living and aging industries. He spent the majority of his career serving as the Director of Legal and EVP for a publicly traded REIT where he focused on risk management, compliance, mergers & acquisitions, and business development. More recently, McKnight owned and operated a property management firm, which he successfully sold to a national real estate company.

Beyond his professional accomplishments, McKnight has a passion for nonprofit and volunteer work, having dedicated himself to organizations such as Big Brothers Big Sisters, Special Olympics Orange County, and Age Well Senior Services. McKnight's wealth of experience, passion for giving back, and thought leadership make him a valuable asset to both Koru and the wider community. His strategic guidance and corporate growth expertise have helped drive success in business, while his philanthropic efforts have made a meaningful impact on the lives of many.

joe@korurm.com /
www.linkedin.com/in/joseph-mcknight-371635b6



STEVE MARQUEZ, CPCU, ARM

SENIOR VICE PRESIDENT

Steve Marquez has dedicated over 35 years to the commercial insurance industry. His journey began as an underwriter for multiple insurance companies before he ventured to establish his brokerage firm in 1991.

Within McGriff, Marquez assumed crucial roles in business development and has held sales and executive leadership positions. He has gained industry recognition for his client advocacy and his adept use of analytics, personalized risk assessments and claims management strategies. With his team, he implemented effective service models to help clients better understand and control their total cost of risk.

With his client-centric philosophy he has collaborated with significant and longstanding manufacturers, distributors, property owners/managers and professional service providers. Additionally, Marquez contributes his expertise by serving on local and national brokerage councils for leading global insurance companies. He also shares his insights as a guest speaker for employer groups on topics spanning from Workers' Compensation abuse to cyber liability.

Marquez holds both the CPCU and ARM professional designations. He earned a bachelor's degree in business administration from the University of La Verne and holds a certification in organizational leadership from the Northwestern University Kellogg School of Management.

smarquez@mcgriff.com /
www.linkedin.com/in/steve-marquez-1b1bb211



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MARC PANNIER

PRINCIPAL, ORANGE COUNTY
EMPLOYEE HEALTH & BENEFITS DIVISION

Marc Pannier, Principal at Marsh McLennan Agency (MMA), was a founding member of the Employee Health and Benefits Division in the Orange County office in 2006. Pannier is a client advocate with over 2 decades of industry experience. His responsibilities encompass business development, managing benefits for complex large and middle-market clients, mentoring and contributing to the growth of the Orange County office.



Prior to MMA, Pannier accumulated 12 years of experience at Marsh & McLennan Companies, including roles with Mercer and Johnson & Higgins. Before venturing into the brokerage industry, he worked for two years at Health Net.

Pannier holds an MBA from the University of California at Irvine and a bachelor's degree from Tufts University. Marc actively participates in various community roles, having served as the President of the Orange County Employee Benefits Council and holding the position of Treasurer for 14 years at both Ashford Place HOA and Oak Creek HOA. He is an active interviewer for the Tufts Alumni Admission Program for Orange County and continues to serve as an Eagle Coach for aspiring Eagle Scouts. Additionally, he dedicates time to coaching and officiating several youth sports programs, including Little League baseball and several forms of soccer including AYSO, Club, High School and College.

Marc.Pannier@MarshMMA.com /
www.linkedin.com/in/marcpannier

ASHLEY POWERS

VICE PRESIDENT OF CLIENT SERVICES

Ashley Powers, the Vice President of Client Services at OneDigital, is a seasoned executive with a proven track record of excellence. Her leadership in Southern California has redefined the client service experience, consistently surpassed expectations and setting new industry standards.



With a results-driven approach, Powers leverages data-driven insights to pinpoint critical client needs and preemptively address potential challenges. Her strategic acumen and innovative solutions have not only solidified strong, enduring client relationships but have also cultivated unwavering trust and loyalty. Her stewardship is reflected in remarkable client retention rates, a testament to her unwavering commitment to client-centric strategies.

Powers excels in building high-performing teams and she has fostered a culture of continuous learning, professional development, and employee engagement, resulting in enhanced team performance and unparalleled employee retention.

Away from the professional realm, Ashley cherishes time spent traveling with her husband and two daughters. She is actively involved with organizations such as SHRM, CEBS, and Vistage and she goes a step further by serving as a Board of Directors member for the Speech and Language Development Center, where her strategic insights and connections enrich and expand access to quality services for individuals affected by developmental disorders.

apowers@onedigital.com /
www.linkedin.com/in/ashley-powers-54809832

DOUG RAMSTHEL

EXECUTIVE VICE PRESIDENT

Doug Ramsthel is an executive vice president & partner at Burnham Benefits and has worked at the firm since 2010. He consults with employers across the US on their benefits plan strategy, design, funding, and communication.

Ramsthel brings over 36 years of expertise in employee benefits. His role involves establishing new client relationships and nurturing existing ones by employing innovative strategies to address health insurance and employee benefit challenges.



Ramsthel specializes in self-funded health plan arrangements, financial analysis, and M&A due diligence. He is also the co-founder of 360 Rx Solutions, Burnham Benefit's affiliated PBM consulting practice.

Recognized as a thought leader, Ramsthel has shared his insights at prestigious industry events and has been quoted and published in esteemed publications such as *California Broker*, *San Francisco Chronicle*, *Forbes*, *Hotel Management*, *Business Insider*, *Risk Management Magazine*, *SHRM HR News*, *Inc Magazine*, *HR News*, *Broker World*, and *Financial Advisor Magazine*. Additionally, he co-authored the book "Access: Addressing the Obesity Crisis."

Ramsthel, an economics Phi Beta Kappa graduate from the University of Oregon, serves on the college of Arts and sciences Advisory Board. He is a certified Financial Planner™ professional and a member of the International Foundation of Employee Benefit Plans (IFEFP).

Doug Ramsthel can be reached at
doug.ramsthel@burnhambenefits.com.

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MARK ROSSKOPF

SENIOR VICE PRESIDENT

McGriff Senior Vice President Mark Rosskopf is based in our Irvine office. With a career spanning 40 years (the past 30 at McGriff), Mark is a recognized leader in the California commercial insurance brokerage community.

Roskopf's insurance journey started after graduating from Whittier College in 1982. He entered a two-year training program with Utica Mutual Insurance Company and eventually achieved a multi-line underwriting position in Utica's Pasadena office.

In 1985 Mark joined his family's insurance agency, Rosskopf Rapp & Schmidt in Rosemead, CA, where he began learning the construction industry. His focus moved to commercial insurance and bonds for local builders and heavy engineering firms before joining a national broker where he worked with large construction firms.

Roskopf currently works in McGriff's Property and Casualty division, specializing in construction and higher education.

Roskopf has tapped into the deep resources at McGriff to offer his clients a diverse range of carriers and products, as well as meaningful loss control and claims management services. He resides in San Juan Capistrano with his wife and two daughters.

mrosskopf@mcgriff.com /
www.linkedin.com/in/mark-rosskopf-71572251



TEVYA WEINTHAL

DIRECTOR OF SALES, PRINCIPAL | BUSINESS INSURANCE DIVISION | CA INSURANCE LICENSE #0F05442

Tevya Weintal is a principal and director of sales for the Business Insurance Division at Marsh McLennan Agency (MMA). Weintal is the driving force behind the development and implementation of sales strategies to meet revenue targets, overseeing the sales team, fostering key client relationships, and ensuring the satisfaction of both prospective and existing clients. Weintal also keeps a keen eye on industry trends and developments, actively identifying new business opportunities for MMA, which may involve the creation of new products or services to ensure MMA's continued competitiveness and long-term growth.

His insurance journey began with MMA in 2005, and he has since cultivated a loyal client base, primarily within the technology and life science sectors. His deep understanding of the unique challenges and needs of these industries has solidified his reputation as a trusted advisor to his clients.

Before joining MMA, Weintal spent eight years gaining first-hand experience in the technology sector, providing him with profound insights into the ever-evolving tech landscape. Additionally, Weintal has earned the designation of AAI (Accredited Advisor in Insurance).

Tevya.Weintal@MarshMMA.com /
www.linkedin.com/in/tevyaweintal



KENDALL WILSON

REGIONAL VICE PRESIDENT OF MARKETING

As a Regional Vice President of Marketing, Kendall Wilson oversees the development and execution of the marketing strategy for OneDigital's West Region. She leads a team focused on retention, growth, and event marketing, helping the organization drive workforce transformation in health, success, and financial security for customers.

For over 12 years, Wilson has continuously demonstrated her leadership skills at OneDigital and she has a proven track record for building high-performing teams. She has a knack for identifying the right people and specialties to deliver measurable results and return on investment successfully.

As a leader, Wilson takes a people-focused approach and constantly advocates to provide opportunities for growth and career development. Her intentional leadership style challenges her team while ensuring that they have guidance and support to succeed.

Wilson's expertise and unwavering dedication to helping accelerate the growth of the organization have led to the OneDigital marketing teams being viewed as true partners to sales and operational teams. She has a passion for working to fix the inefficiencies and gaps in the current healthcare landscape, which wholly aligns with OneDigital's goal of delivering a people-first workforce strategy that prioritizes purpose, mental health and financial wellbeing.

kdwilson@onedigital.com /
www.linkedin.com/in/kendalldwilson



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Investment advice offered through OneDigital Investment Advisors LLC, an SEC-registered investment adviser and wholly owned subsidiary of OneDigital.

