

LEADERS OF INFLUENCE — INSURANCE —

Orange County's Brokers of Excellence



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Morris & Garritano



CHRIS BARTLETT
Marsh Agency



GLEN CARLSON
Marsh Agency



BARRY COLBURN
UCA General Insurance Services



TIM CONARD
Marsh Agency



RONDA ECKHARDT
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STEVE FISK, CIC, ARM, CRIS, CRM
Marsh Agency



RITA GUILD
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ERIN HOEFER
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ROBERT LAN
UCA General Insurance Services



BRENDAN MORRIS
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MARC PANNIER
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DAN TROY
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UCA GENERAL INSURANCE SERVICES
"Service Is Our Strength!"

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

Mark Anelli serves as Senior Risk Advisor, Regional VP of Southern California, and Shareholder at Morris & Garritano. Since joining the agency in 2008, he has combined technical insurance expertise, strategic leadership, and strong client relationships to help businesses navigate complex risks with clarity and foresight.

As the leader of M&G's Southern California presence, Anelli has played an integral role in expanding the agency's footprint in Orange County and continues to guide its growing Irvine team. He builds lasting relationships by developing a deep understanding of each client's business, the challenges it faces, and the solutions needed to protect both its operations and its people.

Anelli also represents M&G throughout the broader business and insurance communities, strengthening the relationships that support the agency's continued investment in Southern California. As a shareholder, he plays a key role in shaping M&G's future, contributing to its long-term direction while helping preserve the culture, values, and client-first approach that distinguish the agency.

Before beginning his insurance career, Anelli played in the NFL, an experience that helped shape the discipline, preparation, and team-oriented mindset he brings to his work today.

His community involvement includes fundraising with the National MS Society and coaching High School football at Notre Dame HS- Riverside. Mark's commitment to clients, community, and the insurance industry has made him a trusted advisor and respected business leader across the regions he serves. Above all, he considers his greatest role to be that of husband and father. He treasures time with his wife and three sons, whether sharing a meal, watching a film, or competing in family sports and games.



CHRIS BARTLETT
SENIOR VICE PRESIDENT & DIRECTOR OF SALES |
EMPLOYEE HEALTH & BENEFITS DIVISION

Chris Bartlett, as the Director of Sales for Marsh Agency's Employee Health & Benefits Division, is a seasoned professional who joined the team in 2023. In his role, Bartlett assumes the pivotal responsibility of overseeing the sales team, focusing on growth strategies, producer development, fostering carrier partnerships, and enhancing industry knowledge. He collaborates with various teams within Marsh Agency to ensure the effective execution of sales initiatives, all while maintaining a strong commitment to placing the best interests of clients at the forefront. Before embarking on his journey with Marsh Agency, Bartlett dedicated twelve 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's academic background is anchored in a bachelor's degree in business administration with a minor in Spanish, earned from Chapman University. Beyond his professional endeavors, Bartlett is a devoted family man, married with two young daughters. In his leisure time, he finds enjoyment in pursuits such as playing hockey, backpacking, and hunting.

Bartlett's 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.

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GLEN CARLSON
SENIOR VICE PRESIDENT

Glen Carlson has been with Marsh Agency since 2004 when he opened the firm's West Coast operations under McGriff. 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.

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Proudly independent.
Purposefully different.

Morris & Garritano combines the resources and market access of a national firm with the service, responsiveness, and accountability of an independent agency. Because independence isn't just how we're structured. **It shapes how we do business.**

Commercial Insurance | Employee Benefits | Risk Management

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Stronger businesses start with smarter risk strategies.

Leaders across all industries face economic uncertainty, workforce challenges, cybersecurity threats, and rapidly changing regulations. Marsh Agency is here to help you navigate it all.

As a trusted partner to organizations throughout Orange County and beyond, Marsh Agency delivers industry-specific risk management, employee benefits, retirement, and insurance solutions tailored to your business goals—whether you're scaling up, streamlining operations, or safeguarding your future.

Local insight. Dedicated service. Powerful partnership.



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BARRY COLBURN

DIRECTOR OF MARKETING

Barry Colburn has built a diverse insurance career spanning claims management, subrogation, personal lines operations, and marketing. Since entering the industry in 1987, he has developed a broad understanding of insurance company operations and the relationships between underwriting performance, claims experience, and successful business development.

Colburn began his career with Cigna and Chubb Insurance before joining Balboa Insurance, where he spent eight years. During his tenure at Balboa, he managed claims offices in Honolulu and Pittsburgh, gaining valuable experience in claims operations, personnel management, and the practical considerations involved in evaluating and resolving insurance losses.

In 1997, Colburn returned to Southern California and joined Precision Risk Management as an auto claims adjuster. He was subsequently promoted to Manager, where he built the company's subrogation department from the ground up. This experience strengthened his expertise in claims recovery, departmental development, and operational management.

Colburn later assumed responsibility for the personal lines unit at Pacific Pioneer Insurance Company, a role he held for three years. In 2004, he shifted his focus to marketing UCA General Insurance, bringing his operational background and understanding of claims and underwriting performance to the business development side of the organization.

In 2012, Colburn was named Director of Marketing. His responsibilities include developing broker relationships, monitoring production results, and maintaining an emphasis on loss performance. His combination of claims, management, and marketing experience provides a valuable perspective on building productive distribution relationships and supporting the organization's business objectives.



TIM CONARD

VICE PRESIDENT, BUSINESS INSURANCE

Based out of Marsh Agency's Aliso Viejo office, Tim Conard has been with the firm since 2019, serving as Vice President in the Business Insurance division. He has over 15 years of insurance industry experience, collaborating with clients to identify and mitigate risks inherent to their operations, and delivering solutions aimed at optimizing total cost of risk.

Conard began his career in consulting, where he worked alongside client executives on the development and implementation of corporate engagements in Strategy, HR, and ERP.

Leveraging his foundation in consulting, he joined Aon in 2011, where he oversaw the placement of complex risk transfer solutions for domestic and international clients.

With Marsh Agency, Conard and his experienced team focus on growth through consistent service and delivery. He and his team strive to earn their reputation as trusted advisors to the clients and community they serve by taking the time to understand clients' risks, needs, and goals, and approaching their business challenges as opportunities to add value.

Conard earned his bachelor's degree in business management from Miami University (OH). He is a licensed California Property & Casualty and Life & Health agent and holds the Chartered Property Casualty Underwriter (CPCU) and Middle Market Risk Manager (MMRM) designations.

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RONDA ECKHARDT

SENIOR VICE PRESIDENT, CONSULTING SERVICES | EMPLOYEE HEALTH & BENEFITS

Ronda Eckhardt is Senior Vice President of Consulting Services in Marsh Agency's Employee Benefits department. With over 30 years of experience in employee benefits, Eckhardt is responsible for overall client management in a variety of industries including: pharmaceutical, retail, medical device, non-profit, manufacturing and engineering. Many of her clients are family-owned.

Eckhardt started her career with McGriff in 1997, prior to its acquisition by Marsh Agency. She currently leads a team recognized at Marsh Agency for delivering exceptional service, sound long-term financial management strategies and creative employee communications. Clients appreciate the tremendous value Eckhardt and her team provide, alleviating much of their workload via Marsh Agency's internal benefits administration services and managing their benefit costs below trend.

She is a licensed California Life and Health Property & Casualty agent and holds a bachelor's degree in business administration from the University of Colorado Boulder. Eckhardt also mentors future CU Leeds School of Business graduates, serves as vice president of the Orange County alumnae chapter of Alpha Chi Omega and the committee of the Orange County C-Sweet organization which supports executive women across industries.

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MARSH AGENCY

STEVE FISK, CIC, ARM, CRIS, CRM

EXECUTIVE VICE PRESIDENT | EMPLOYEE HEALTH & BENEFITS DIVISION LEADER

Steve Fisk is Executive Vice President and Principal at Marsh Agency, with more than 20 years of experience in risk management and insurance. Since joining the firm in 2007, he has contributed to its growth, including co-founding and leading the Consumer Goods Practice Group, serving the retail, apparel, beauty, and consumer products industries.

Fisk has earned numerous industry honors, including Risk & Insurance Power Broker (2013, 2017, 2023), Insurance Business America's Top 100 Producers (2018, 2019), and recognition as a Los Angeles Times Beauty & Fashion Business Visionary. He has also twice received Marsh Agency's Business Insurance Producer of the Year award and previously served on the firm's West Region Executive Committee.

Known for his relationship-driven approach, Fisk connects clients with strategic partners across the legal, financial, and private equity sectors. He began his career at Liberty Mutual in 2003 and has supported charitable organizations, including City of Hope and Miracles for Kids, through board service.

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MARSH AGENCY

RITA GUILD

EXECUTIVE VICE PRESIDENT | EMPLOYEE HEALTH & BENEFITS DIVISION LEADER

Rita Guild is the Executive Vice President and Orange County & Los Angeles Division Leader of Employee Health & Benefits at Marsh Agency in Orange County. Since joining Marsh Agency in 2014, she has successfully brought in many highly regarded businesses, innovated service offerings, and shaped company culture. Her passion for mentorship led her to join the leadership ranks, where she saw an opportunity to grow future leaders and better serve her clients.

Guild plays an integral role in guiding Marsh Agency teams through the dynamics of rapid growth. Her resilience and flexibility have helped her sales and service colleagues grow professionally, 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 and driving early adoption of innovative solutions in self-funding, pharmacy savings, and point solutions, all while easing clients' administrative burdens.

Her early career in Coachella Valley marked the beginning of her successful path in the industry. Prior to her role at Marsh Agency, she served as the Vice President of Employee Benefits at another prominent Orange County brokerage. Guild is actively involved with South Coast Christian, empowering women in Life Recovery. Her leadership skills, passion for mentorship, and commitment to making a positive impact make her invaluable.

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MARSH AGENCY

ERIN HOEFER

SENIOR VICE PRESIDENT, CONSULTING SERVICES | EMPLOYEE HEALTH & BENEFITS

As Senior Vice President, Consulting Services at Marsh Agency, Erin Hoefer oversees a client management team that provides employee benefits solutions for large employers in the manufacturing, high tech, aerospace, and defense industries. Hoefer joined McGriff in 2010, and following Marsh Agency's acquisition of McGriff in November 2024, continues to serve clients as part of Marsh.

Hoefer and her team help clients identify innovative solutions to manage their employee benefits spend. She also helps clients identify potential vulnerabilities in their existing benefits plans and develops strategies to leverage resources and mitigate risk exposures.

A 25-year veteran of the employee benefits industry, Hoefer began her career as a retirement actuary at Mercer. She enjoys speaking at industry events and conferences on topics including: corporate data-driven decision-making to manage health care spend and strategies for successfully integrating health plans after a merger or acquisition.

Hoefer studied mathematics at DePaul University and moved to California 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.

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Lin Lan, CPCU, CEO and Founder of PPIG with her son Robert Lan, CEO of UCA General

A Family of Companies



Pacific Pioneer Insurance Group

Lin W. Lan is the Founder, President and CEO of Pacific Pioneer Insurance Group, a Southern California-based insurance organization encompassing a family of companies serving the insurance needs of businesses, agents and brokers throughout the Western United States.

Ms. Lan began her entrepreneurial journey in 1980 when she founded Unico Insurance Agency, with the goal of providing insurance products and services to California's growing Chinese immigrant community. An immigrant herself, Lan built Unico from a small independent insurance agency into a successful business serving diverse communities and a broad range of commercial clients.

Building on the success of Unico, Ms. Lan went on to establish additional companies that collectively became Pacific Pioneer Insurance Group. Today, the group includes Unico Insurance Agency, her original retail agency serving the small business community of Southern California, UCA General Insurance Services, an MGA writing over 30 Preferred Programs in seven states, Pacific Excess Insurance Marketing, a wholesale brokerage writing E&S business and Workers' Compensation, and Precision Risk Management, in-house claims administrator for UCA policies. Each company serving a distinct role within the insurance industry, as Lan imagined from the start.

With more than four decades of experience in insurance, Ms. Lan brings a practical, entrepreneurial perspective to the industry. Her early years selling insurance directly to businesses gave her firsthand insight into the challenges faced by agents, brokers and business owners. That experience continues to influence her hands-on approach to leadership and her emphasis on responsive service and efficient decision-making.

Ms. Lan holds the Chartered Property Casualty Underwriter (CPCU) designation and has built her organizations around a commitment to serving independent insurance professionals and the businesses they protect. Her leadership philosophy is reflected in UCA's longstanding motto, "Service Is Our Strength!"®.

More than 40 years after founding her first company, Ms. Lan continues to lead Pacific Pioneer Insurance Group and its affiliated businesses, building on the entrepreneurial vision that began with Unico Insurance Agency in 1980. She runs her organization with her son Robert Lan, and an experienced Management Team, many of whom have been with the company since the very beginning.

UNICO Insurance Agency, Inc.
Since 1980



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PRECISION RISK MANAGEMENT, INC.

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STACY HUBBARD, MHA PRESIDENT

Stacy Hubbard is the President for the Orange County office. She specializes in employee benefits for both public and private industry sectors. Hubbard has been in the health care industry for over 30 years and has experience with fully insured and self-funded health plans. Her responsibilities include client consulting and management, compliance, strategic planning, and project management.

Prior to joining Marsh Agency, Hubbard managed the client services department in Orange County at Gallagher Benefit Services for eight years. Prior to moving to the broker side of the industry, Hubbard worked for seven years at Beech Street, a national PPO network for self-funded employer groups.

Hubbard earned a bachelor's degree in organizational learning and a master's degree in healthcare administration (MHA) from Chapman University. She is actively involved with the Ronald McDonald House organization and volunteers her time for various events throughout the year.

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DOUGLAS KING, MBA EXECUTIVE VICE PRESIDENT, CONSULTING SERVICES | EMPLOYEE HEALTH & BENEFITS

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

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

Additionally, King 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.

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ROBERT LAN CEO

Robert Lan has built a career in the insurance industry spanning more than three decades, with extensive experience in claims, underwriting, program development, and executive management. As Chief Executive Officer, he oversees the organization's operations and provides leadership informed by a thorough understanding of the technical and business aspects of commercial insurance.

Lan graduated from the University of Hawaii, where he attended on a football scholarship. He began his insurance career in 1989 as a claims adjuster, gaining valuable firsthand experience in evaluating losses, investigating claims, and understanding the practical implications of insurance coverage. He subsequently transitioned into underwriting, broadening his expertise in risk assessment and insurance program management.

In 1994, Lan developed a commercial insurance program from the ground up with Sterling Casualty, an experience that strengthened his capabilities in program development and commercial underwriting. He joined UCA in 1996 and continued to expand his responsibilities within the organization.

In 2001, Lan was named President of UCA, assuming responsibility for day-to-day operations and direct oversight of the commercial underwriting division. In this role, he helped guide the organization's operational activities while maintaining a focus on underwriting performance and business development.

Lan was appointed Chief Executive Officer in 2015. His career progression from claims adjusting to underwriting and executive leadership gives him a well-rounded perspective on the insurance business. He brings decades of practical industry knowledge to his role, with a focus on effective operations, sound underwriting practices, and the continued development of the organization.



M&G MORRIS & GARRITANO

BRENDAN MORRIS CEO

As Chief Executive Officer of Morris & Garritano, Brendan Morris leads the agency's overall strategy with a focus on sustainable growth, an employee-centric culture, and continually improving the client experience. More than 30 years into a career that follows in the footsteps of his father and grandfather, he has helped evolve the agency while preserving the values and relationships that have defined M&G for generations.

Under Morris' leadership, Morris & Garritano has expanded its presence throughout California, including continued investment in Orange County. His involvement in the region reflects the agency's long-term commitment to Southern California and ensures that M&G's growth there is supported by direct C-suite engagement and a strong connection to the local business community.

Morris also represents M&G within leading insurance organizations, including MarshBerry, the Independent Insurance Agents & Brokers of California, and The Council of Insurance Agents & Brokers. His leadership has helped the agency earn national recognition for growth, workplace culture, and industry performance.

A graduate of Santa Clara University with a degree in Finance, Morris has also served in leadership roles with business, education, and community organizations throughout the Central Coast. Outside of work, he enjoys spending time with his wife, Vicky, and their two daughters and is an avid Dodgers fan.



MARSH AGENCY

MARC PANNIER EXECUTIVE VICE PRESIDENT | EMPLOYEE HEALTH & BENEFITS

Marc Pannier, EVP at Marsh Agency, was the founding member of the Employee Health and Benefits Division in the Orange County office in 2006. Pannier is a client advocate with over 3 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 Marsh Agency, Pannier accumulated 12 years of experience at Marsh & McLennan Companies, including roles with Mercer and Johnson & Higgins. Before venturing into the brokerage side of the insurance industry, he worked for two years in customer service 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 16 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.

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MARSH AGENCY

MARK ROSSKOPF SENIOR VICE PRESIDENT

Senior Vice President, Mark Roskopf, is based in the Aliso Viejo office. With a career spanning 40 years (the past 30 at McGriff), Roskopf 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, Roskopf 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 Marsh Agency's Property and Casualty division, specializing in construction and higher education. "I've gravitated to two of the most challenging industries for insurance placement and service requirements," he said. "I'm fortunate to have an incredible team of seasoned professionals supporting my efforts. They are truly perfectionists."

Roskopf has tapped into the deep resources at Marsh Agency to offer his clients a diverse range of carriers and products, as well as meaningful loss control and claims management services.

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FRANK STIPATI

PRESIDENT

Frank Stipati brings more than three decades of insurance industry experience to his role as President of UCA, with a background spanning loss control, underwriting, branch management, and executive operations. His career reflects a steady progression through increasingly responsible leadership positions, supported by a strong understanding of insurance operations and the needs of the company's distribution network.

Stipati graduated from California State University, Dominguez Hills, where he studied management and marketing. He began his insurance career in 1989 in loss control with Precision Risk Management, developing an early foundation in evaluating risks and understanding the factors that influence insurance performance. In 1990, he joined UCA's underwriting department, beginning a long-standing relationship with the organization.

In 1994, Stipati helped establish UCA's first branch office in Scottsdale, Arizona, contributing to the company's expansion and gaining valuable experience in developing branch operations. He returned to California in 1996 to manage UCA's San Diego branch office, where he continued to build his operational and leadership expertise.

In 2004, Stipati was named Vice President of UCA, with responsibility for overseeing all branch operations. This position allowed him to apply his experience across the organization, supporting consistent operations and effective coordination among branch offices.

In 2016, he was appointed President of UCA and assumed responsibility for the company's day-to-day operations. In this role, Stipati draws on his extensive background in underwriting and branch management to guide operational priorities and support the organization's ongoing business objectives.



DAN TROY

SR. BENEFITS ADVISOR, PRINCIPAL, SHAREHOLDER

Dan Troy helps organizations turn the financial and regulatory complexities of employee benefits into strategies that support both their people and their business. As a Senior Benefits Advisor, Principal, and Shareholder at Morris & Garritano, he brings a distinctly analytical perspective to plan design, cost management, and long-term benefits decision-making.

A Certified Public Accountant and Cal Poly graduate with a degree in Business Administration, Troy began his career with Price Waterhouse Coopers, LLP in Silicon Valley, providing financial and tax accounting services to public and privately held technology companies. He later co-founded Gray & Troy Insurance in 1999, building a benefits practice that ultimately joined forces with Morris & Garritano.

Today, Troy draws on that combination of financial discipline, entrepreneurial experience, and benefits expertise to help employers evaluate risk, respond to regulatory change, and make informed investments in their workforce. He has also completed extensive study of the Affordable Care Act and healthcare reform through The American College.

As a Principal and Shareholder, Troy helps shape the agency's long-term direction while advancing M&G's Employee Benefits capabilities and strengthening the client relationships behind its growth. His community involvement includes service on nonprofit boards and committees, as well as support for organizations focused on strengthening local communities, supporting youth, and expanding access to essential resources.



M&G MORRIS & GARRITANO

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TEVYA WEINTHAL

EXECUTIVE VICE PRESIDENT |
BUSINESS INSURANCE DIVISION DIRECTOR

Tevya Weinthal is a visionary leader reshaping the business insurance landscape in Orange County. As Executive Vice President of the Business Insurance Division at Marsh Agency, he drives strategic growth and client success across the region's most dynamic sectors—technology and life sciences.

With more than two decades of insurance expertise, Weinthal has built a reputation as a trusted advisor and industry influencer. His unique vantage point stems from eight years in the technology sector before his insurance career, giving him unparalleled insight into the operational challenges and risk profiles of innovation-driven businesses. This cross-sector perspective informs his strategic vision and client advisory approach.

At Marsh Agency's Orange County office, Weinthal leads both sales and service teams with a focus on forward-thinking solutions. He shapes competitive market positioning through data-driven sales strategies, identifies emerging business opportunities, and champions the development of innovative products and services. His leadership extends beyond revenue targets—he cultivates enduring client relationships built on deep industry understanding and proactive risk management.

Weinthal's influence in the market is grounded in his ability to anticipate industry trends, connect business challenges with strategic insurance solutions, and mentor the next generation of insurance professionals. His work reflects a commitment to positioning Marsh Agency as the preferred partner for complex, evolving insurance needs in Orange County's technology and life science communities.

A California-licensed insurance professional (AAI), Weinthal continues to advance the insurance industry through thought leadership and a client-first approach to risk and opportunity.

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