



SHEPPARD INSURANCE SERVICE AND RISK MANAGEMENT INC.
...an Assurex Global Partner



May 1, 2014

Attention - Sheppard Insurance now a member of Excel Insurance Group!

It's official — **Sheppard Insurance, in partnership with four prominent Alberta insurance brokerages, has formed the Excel Insurance Group of brokers and will be changing our name to Sheppard Insurance Service and Risk Management, in addition to incorporating the Excel brand into our marketing and promotional materials.**

A new name, an exciting new chapter for our firm and a re-energized team — all strongly supported by the fundamentals that helped make Sheppard Insurance one of the leading brokerages in Edmonton. Most importantly for our clients, team members and insurance partners, the key strengths of our firm are either enhanced or remain solidly in place:

- **Service depth and expertise** - 100% of the Sheppard team of insurance and risk management professionals will continue as we begin this new chapter. No staffing changes have occurred and none are contemplated.
- **Market strength** – with our new association, Sheppard will enjoy access to over thirty (30) of the best rated general insurance companies in Canada. Further, Excel brings trusted long-term market relationships and preferred broker status with the largest and best insurers in Canada.
- **Independent ownership** – The foundation of the Excel Insurance Group does not involve the sale to, or acquisition of, our brokerage by Excel. We are a full and equal partner in the Excel Insurance Group and the principals of Sheppard Insurance will continue to be Grant Sheppard and Scott Zurfluh
- **International capabilities** – Excel is trademarked and licensed across Canada and is a full partner in Assurex Global, the world's largest independent broker network having more than 600 partner offices spanning 80 countries across six continents. We are very excited to add truly national and international capabilities to our list of services.

With the establishment of the Excel Insurance Group, the Sheppard Insurance team is now one of five (5) partnered independent brokerage offices in the province of Alberta, together placing some eighty (80) million dollars in premium on behalf of its valued clientele. Our business relationship is complimentary, allowing team members from all offices to come together as required for a particular client need or opportunity. The Excel Group has experts in many industry and risk sectors, with one of the highest ratios of professional designations per staff member in the industry.

Sheppard Insurance is excited to be a part of the team of insurance and risk management professionals that comprise Excel Insurance Group. All of our team members are eager to embark on this next phase of our entrepreneurial journey. We remain committed to delivering exceptional service to our valued clients and thank you in advance for your continued trust and support.

Should you have any comments or questions about this transition, please contact either of us.

Best regards,

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