

John T. Andreoli,
President & CEO



Sullivan Group: *A Tradition of Independence and Excellence*

Started as the William F. Sullivan Insurance Agency in 1957, the company was founded on the premise of providing exceptional service through honesty, integrity, and respect. The company continued to grow and in 1968 they partnered with the Green Isenberg Small Insurance Agency and The Carrick Insurance Agency to design a cluster service company that would create operating efficiencies by eliminating the duplication of non-insurance related functions such as accounting, claims, and clerical.

This service company concept allowed the agencies to flourish during the soft market cycle and beyond. In 1991 the agencies, along with the Arthur J. Andreoli Life Insurance Practice, became one and emerged as the Sullivan Insurance Group, with each principal continuing to have ownership in the firm.

While the Worcester and Needham locations focus on property & casualty insurance and risk management for individuals and small to mid-sized businesses, their sister company, Sullivan Benefits, provides employee benefits to mid to large companies out of their new Marlborough location. Financial Services are provided through their sister companies, Managed Wealth Strategies, LLC in Northborough, and William F. Sullivan Financial Services Inc. in Marlborough. "Collectively, Sullivan Group has evolved into a modern-day regional insurance and risk management firm, committed to our independence," says John T. Andreoli, MBA, CPCU, LIA, President and CEO.

Sullivan Group has the expertise and experience to customize a unique, affordable solution for almost any commercial enterprise. With a focus on nine core industries (construction, real estate, life sciences, wholesale, education, financial, manufacturing, technology, and non-profit organizations) they have worked with a broad array of clients over the years and have become a trusted advisor constantly expanding their capabilities to meet

the growing needs of their customers.

As one of the few truly independent agencies left in the region, Sullivan Group knows that they are unique and want to stay that way. "We have chosen to remain independent and will continue to operate under a service model that attracts and retains professional producers and customer focused service people," says Andreoli.

When they had outgrown their space, they purposely chose to stay in Worcester and relocated to the new Unum Building at 1 Mercantile Street. "Although we are a growing company with clients throughout New England, it made sense to stay in Worcester. We are proud of our local roots and have always been actively involved in a variety of community initiatives and non-profit organizations. The agency supports these financially, as well as through volunteering, coaching, or actively participating on their board of directors," says Andreoli.

Their leadership and excellence in the industry has been recognized and has led to many awards over the years. Whether it is an award or designation from an insurance carrier, or recognition within the community for making a difference, Sullivan Group will continue their approach of providing exceptional service through honesty, integrity, and respect.

"We are proud of our accomplishments and recognition within the insurance industry, but we are most proud of the continuity our employees provide and our long-tenured relationships with customers, service staff, and insurance carriers. We intend to continue this tradition of independence and excellence into the next generation, not only throughout New England, but countrywide," Andreoli notes.

For more information on Sullivan Group, visit www.sullivangroup.com and follow them on Social Media (*LinkedIn and Facebook*).

MASSACHUSETTS

Sullivan Group

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Product or Service: Property & casualty insurance for companies and individuals, risk management services, employee benefits, and financial services.

No. of Employees: 50

Head of Company: John T. Andreoli, MBA, CPCU, LIA, President and CEO

Year Founded: 1957

