



INDEPENDENCE CHANGES EVERYTHING



BECOMING AN ELITE PRODUCER AT LOCKTON

It all started with Jack

A HISTORY OF ENTREPRENEURSHIP AND SERVICE

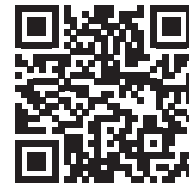
In 1966, Jack Lockton founded our company with a simple idea: deliver the best service in the industry. In the decades since, Lockton has become the world's largest privately owned, independent insurance brokerage by continuing to attract great people and focusing on our purpose: to empower people, companies, and communities to achieve their ultimate potential.

Our company has developed its core values and philosophies by valuing partnerships, fostering innovation, maintaining a sense of urgency, and building expertise to meet the changing demands of our clients.

Lockton's proven track record means our clients can expect us to perform with the same passion and expertise that we have demonstrated for nearly six decades.



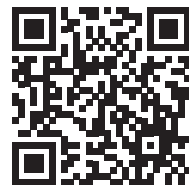
LEARN A BIT OF LOCKTON'S HISTORY FROM A FEW OF OUR VIDEOS.
[SCAN THE QR CODES TO WATCH.](#)



[WHAT WON'T CHANGE.](#)



[STORY OF LOCKTON.](#)



[CATEGORY OF ONE.](#)

Lockton Producer Ten Commandments

Continually set a high standard — lead by example and be aware of how you are perceived by other Associates.

Fully accept the responsibility of the new business and renewal strategy and client commitments.

Be accountable, work “hard” all the time, be fiercely aggressive and results-oriented.

Appropriately use company resources with results in mind.

Be an involved, enthusiastic, and visible leader.

Be part of the business community, including civic and charitable involvement.

Maintain a high level of business acumen and insurance industry professionalism.

Develop a network of business relationships.

Support fellow Producers.

Know and live the Lockton Philosophies.



Lockton Philosophies

Lockton Companies will:

- Be committed to the highest standards of excellence in everything we do.
- Practice the Golden Rule and sustain a highly ethical, moral, and caring culture.
- Recognize our Associates as our most valuable assets.
- Provide opportunity and support to allow all Associates to grow, improve, and achieve their ultimate potential.
- Recognize and substantially reward exemplary Associate performance.
- Respect, value, and nurture each of our client and carrier relationships.
- Be composed of people who demonstrate a passion for delivering unparalleled service — internally and externally.
- Make a recognizable difference to our clients' businesses through innovative solutions to meet their insurance needs.
- Be proactive in sustaining meaningful corporate social and civic responsibility.
- Maintain our independence and private ownership.
- Manage our business for consistent and orderly growth.
- Be a fiercely competitive and aggressive sales organization.
- Generate fair and healthy financial returns.



Page Vogelsang, EVP, Partner

What it means to be an elite Producer at Lockton

The ability to produce stellar revenue numbers is just one piece of the equation. At Lockton, culture matters. Treating one another right, caring for each other, and doing the right thing by the client are all integral parts in what makes a Producer elite in the Lockton model. We do not give lip service to our Lockton Philosophies and Ten Commandments — we live them in all that we do.

Joining Lockton as a Producer is a privilege. The rewards are innumerable. Learn and live by what Lockton has to offer, and in the words of Jack Lockton, **“You too will be the luckiest person on the planet.”**

\$5M⁺

BOOK OF BUSINESS
120 PRODUCERS

\$10M⁺

BOOK OF BUSINESS
40 PRODUCERS

Why join Lockton

Lockton is globally powered and locally driven, meaning we have the reach and resources for you to be successful.

Learn more about why Producers join Lockton.

A FOCUS ON SPECIALIZATION

Lockton has some of the best specialists in the business to solve client risk management or employee benefits issues.

COMPENSATION MODEL

Our compensation model has proven that earning potential is unlimited. Your income is directly tied to your performance, effort, and results - there are no fixed caps or ceilings on how much you can earn.

DECENTRALIZED DECISION-MAKING

Clients get higher levels of service because our local offices own the relationships and therefore the decision-making, too.

DEDICATED ACCOUNT TEAMS

Our Associates are our most valuable asset. We have dedicated account teams to service clients, allowing you to concentrate on building relationships and winning business.

ENTREPRENEURIAL CULTURE

One of our greatest attributes is Lockton's entrepreneurial culture. Producers are entrusted to be flexible, innovative and make quick decisions for their clients, to own their own career path, and to pursue their passions.

MENTORSHIP & DEVELOPMENT

Producers have access to industry-leading mentorship, development, and coaching programs to help them achieve their highest levels of success.

PRIVATE OWNERSHIP

As a privately owned business, Lockton is free from the pressure of quarterly earnings. We take a lower margin so we can strategically invest in our business to build long-term, innovative solutions that are guided by client needs rather than market demands.

PRODUCER LEADERSHIP

Producer leadership is the backbone of our company. This creates a culture of responsibility and accountability - a competitive advantage that in turn makes our business stronger and better.

RESOURCE RICH

We offer clients some of the top resources in the industry. Subject matter experts are drawn to Lockton because of our reputation, entrepreneurial culture, and intense client focus.

STRATEGIC RISK CONSULTING

Clients value our advice, which goes well beyond insurance basics. Lockton's unique approach connects our clients' business objectives to their risk and benefits placements.

The Lockton difference

In their own words

“I chose Lockton because of our private status, entrepreneurial spirit and culture. It was very important we were Producer-led and empowered Associates to provide high-touch service and ownership of clients, leaving me to do what I do best — connect and bring people to Lockton. The team really supports me to be the best version of myself, and our financial structure allows me to take advantage of business to build a legacy for myself and my family.”

— **LISA BORDELON**
EXECUTIVE VICE PRESIDENT



“Lockton is dedicated to specialization — building the best teams and suite of capabilities to support our clients. I came to Lockton to build capabilities focused on technology-related risks with some of the risk and insurance industry’s best people. And you can only find those people at Lockton.”

— **PREET GILL**
EXECUTIVE VICE PRESIDENT



“Producers ultimately choose Lockton over competitors for a lot of reasons. One reason is the financial commitment Lockton is willing to make up front to recruits they believe in. Another reason is the ability to grow your book. Lockton allows Producers to grow their books as much as they want — it is just up to how hard they want to work. At Lockton, you get out what you put in. The culture at Lockton is also unbeatable. Anyone who fits the culture does not consider themselves to be above anyone else.”

— **HARDIE EDGECOMBE**
PRODUCER PRESIDENT,
NEW ORLEANS



“I’ll always say when I’m interviewing future talent, there’s no other place to be in sales other than Lockton. Lockton creates the right environment and structure to be successful. It’s up to the Producer to utilize the tools and resources provided. The entrepreneurial spirit, the family ownership, and the independence makes it a great place to achieve what you want to do in your career. Lockton is a great home to be a Producer.”

— **JONATHAN HACKETT**
GLOBAL REAL ESTATE &
CONSTRUCTION EXECUTIVE
COMMITTEE MEMBER

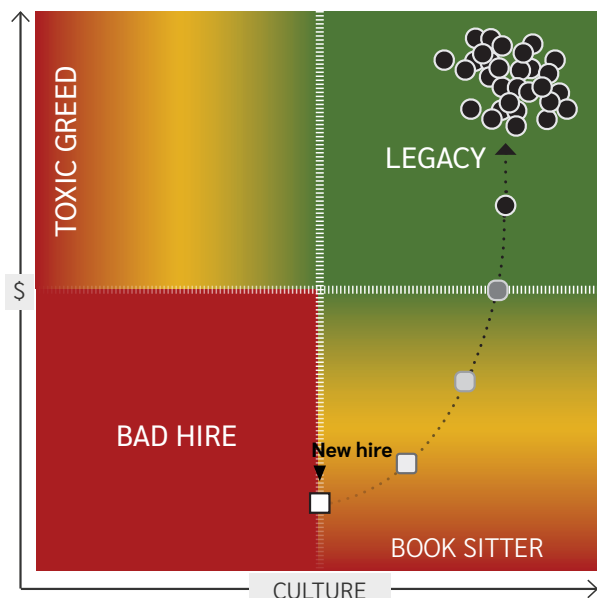


“Lockton has created an outlet for me that expands beyond being an insurance broker. My overarching goal is that my life mirrors the values I hold close — family, friendships, community and legacy. I am most grateful that Lockton’s philosophies are more than a list of values. They come to life every day through our Associates’ commitment to clients, communities and each other.”

— **JENNA HOWARD**
EXECUTIVE VICE PRESIDENT



Where do you want to be?



At Lockton, you have the opportunity to build a **legacy**.

We believe in empowering our Producers to achieve greatness and build a lasting legacy that reflects your passion, dedication, and vision.

Support & development

Lockton Producers believe in continual self-improvement and have access to industry-leading mentorship, development, and coaching programs to help them achieve their highest levels of success.

DEVELOPMENT

Lockton is committed to your growth and success. We offer personalized development options tailored to your unique experience, career stage, and industry. Our programs are designed to help you:

- Expand your business.
- Build a competitive niche.
- Learn industry best practices.
- Form valuable peer relationships globally.

COACHING

Lockton leverages professional development coaches to cultivate the skills and behaviors exemplified by top athletes, Navy SEALs, and other high-level performers. Our coaching focuses on:

- Consultative conversations.
- Elite mindset.
- Elevating your performance.

MENTORSHIP

New Producers at Lockton are paired up with a mentor to help them find success at Lockton. New Producers can expect:

- Guidance and support.
- Skill development.
- Personal growth.

Empowered leaders

Elite Women Producers



Brooke Runnion, EVP

Founded in 2015, Lockton's Elite Women Producers (EWP) is a platform for high-performing Lockton Producers to connect, share ideas, and leverage a network designed to accelerate performance. Through regular meetings, annual forums, and retreats, this group of talented women leaders has created a unique support system in the insurance industry. This group consists of Producers from all Series and plays a key role in the leadership of each Series. The group is also aligned with Lockton's objectives in continuing to be the best place for our clients, Associates, and communities.

EMPOWERING WOMEN BROCHURE

Features female Producers, in their own words, giving high-level overviews of their careers and what makes Lockton special. The short bios touch on their personal and professional lives.



Scan the QR code to view brochure.

MEET HEATHER & MELISSA

Two Producers who have made a significant difference in the lives of their clients, Associates, and communities.



Heather Larson
SENIOR VICE PRESIDENT



Melissa Randolph
SENIOR VICE PRESIDENT



Scan the QR codes to watch their videos.

At Lockton,
we offer
something
you may not
be used to in
insurance —
creative
thinking.

What makes Lockton stand apart is also what makes us better: independence.

As the world's largest privately held, independent insurance broker, we answer to no one but our clients. Unconstrained by the rigidity commonly associated with our industry, we challenge the norms of what a brokerage can be. We are creative thinkers who are empowered to do what's best for our clients at all times. **JUST THINK WHAT THAT COULD DO FOR YOU.**

Risk Solutions

Lockton helps clients identify, understand and mitigate critical risks through insurance and other strategies. We deliver risk management solutions designed to optimize your capital, facilitate your growth, and improve your bottom line.

- Risk analysis
- Risk transfer & financing
- Risk control

People Solutions

Businesses can reach their full potential when their people reach theirs. That's why employers need solutions that help balance attracting and retaining talent, manage costs, and promote employee wellbeing.

Lockton helps provide solutions that make organizations more successful and people's lives better, specifically in the areas of:

- Employee experience and engagement
- Total rewards and benefits
- Measurement and management

Lockton at a glance

As a family-owned organization, we're not driven by the quarterly pressure of financial markets. Our independence lets us challenge the norms of what a brokerage can be and frees us to always act in the best interest of our clients.

\$3.55B

2024 GLOBAL REVENUE

65,000+

CLIENTS WORLDWIDE

96%

CLIENT RETENTION

14%

ORGANIC
GLOBAL GROWTH

\$71B+

PREMIUM VOLUME
WORLDWIDE

\$23M+

ANNUAL CHARITABLE
DONATIONS



Producer + Associate Collaboration

“Lockton is the best place to be a Producer because Lockton has the best people. They’re the most qualified. You can build a long-term business because you’re surrounded by people who want you to be successful.”

- Fred Zutel, Executive Vice President, Southeast



At Lockton, our people are our most valuable asset. As outlined in our 10 Commandments, Producers are expected to be involved, enthusiastic, and visible leaders in both our business and culture. Without our Associates, our success would not be possible.

Account Teams

We invest heavily in attracting and retaining top talent for our Account Teams. These teams are composed of industry-leading professionals who bring their expertise and dedication to every client interaction. By surrounding our Producers with the best talent, who manage the day-to-day needs of clients, we ensure Producers have the resources and support needed to thrive. This investment in top-tier talent not only enhances our service quality but also fosters a collaborative environment where Producers can build strong relationships, innovate with industry experts, and achieve outstanding results.

Culture Champions

Our Producers are not just business leaders; they are cultural leaders as well. We pride ourselves on a vibrant, supportive community where every voice is heard and respected. Producers are expected to lead and participate in local Lockton events and community activities, playing a key role in nurturing and growing our culture.




Adam McDonough, Partner, and local Associates volunteered at a local food pantry during the Insurance Industry Charitable Foundation’s Week of Giving.



Each year, Producers in Kansas City hand out Thanksgiving turkeys a token of appreciation for local Associates.



Women Producers in Houston sponsored a “Grit and Grace” event featuring LPGA golfer Matilda Castren to inspire women in business to celebrate their achievements.



Ted Brown
PRODUCER OF THE YEAR

Community Impact

Lockton empowers Associates to make a difference in the communities where we work and live. We provide our people with paid volunteer time to support the organization(s) of their choice. In 2023, Lockton's charitable donations totaled more than \$23 million. Those funds provided support to a variety of charities that were important to our people — and Lockton.

- Community development
- Healthcare
- Human services
- Veterans
- Women
- More

Producer of the Year

Each year, Lockton names a Producer of the Year — someone who goes above and beyond to show their passion and commitment to their clients, fellow Associates, and community.

Because of his ongoing work with the veteran community, along with his incredible business results and leadership inside and outside of Lockton, Ted Brown was named Producer of the Year in 2023. He was awarded the Producer Community Impact Award as a result, earning \$50,000 for a nonprofit of his choice.

Read [more](#) about how Lockton empowers Ted to reach his ultimate potential.



Scan to watch Ted's
Producer of the Year video



UNCOMMONLY INDEPENDENT