



# Uncommonly Independent

*Lockton at a glance 2021*





# Independence changes everything

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.**

# Uncommon results

\$2.16B

2021 GLOBAL REVENUE

13.4%

ORGANIC  
GLOBAL GROWTH

65,000<sup>+</sup>

CLIENTS WORLDWIDE

8,500<sup>+</sup>

ASSOCIATES WORLDWIDE

97%

CLIENT RETENTION

\$39.5B<sup>+</sup>

PREMIUM VOLUME  
WORLDWIDE

12

CONSECUTIVE YEARS AS  
BEST PLACES TO WORK

\$5M<sup>+</sup>

ANNUAL CHARITABLE  
DONATIONS



# Lockton's service offerings

## Risk management

- Actuarial & analytical services
- Alternative risk financing, captive consulting & collateral solutions
- Claim cost consulting & complex case support
- Corporate restructuring
- Cyber consulting
- Global solutions
- Loss control services
- M&A advisory
- Product recall & contamination
- Reputational harm
- Strategic risk consulting, ERM & emerging risks
- Surety services
- Terrorism, political risk & trade credit

## Benefits

- Absence management
- Actuarial services
- Benefits administration
- Complex claims management
- Compliance services
- Data analytics
- Employee communications
- Employer stop loss programs
- Global benefits
- Government relations
- Health & welfare consulting
- HR outsourcing & technology solutions
- Human capital consulting
- M&A advisory
- Pharmacy consulting
- Population health & well-being
- Total rewards & compensation
- Voluntary benefits

## Retirement

- Defined benefit de-risking, plan design & management
- Defined contribution plan design & management
- Employee engagement & financial wellness
- Executive benefits plan design & management
- Executive benefits restoration
- Fiduciary oversight & governance
- Government relations
- Investment monitoring & advice
- Retirement strategy development
- Vendor management

*We're purposefully unconventional,  
insatiably curious and  
Uncommonly Independent<sup>TM</sup>.*





## *Entrepreneurial spirit*

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**WHEN JACK LOCKTON FOUNDED THE COMPANY IN 1966, HE SET THE BAR FOR CLIENT PARTNERSHIPS.** He knew that to win and keep business, Lockton Associates needed to make client relationships their first priority. Jack's fierce commitment to service empowers every Associate with a single-minded focus on delivering uncommon results for clients. That entrepreneurial spirit is ingrained in every aspect of Lockton's culture.

As a family-owned organization, we're free from quarterly demands of financial markets. Lockton offices around the world have industry-leading experts who dedicate themselves to understanding your business. This unconventional approach brings about something quite extraordinary in the insurance business – local partners with the focus and freedom to do what's right for you.

## *Empowered people*

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**THE BEST AND BRIGHTEST ARE DRAWN TO LOCKTON BECAUSE THEY WANT TO MAKE A DIFFERENCE, NOT CONFORM TO THE REST OF THE INDUSTRY.** In an ever-changing marketplace, Lockton Associates are empowered to learn and grow through unique experiences and educational opportunities. The Lockton culture fosters a work-life balance that helps ignite personal and professional passions.

Life at Lockton is about great benefits, professional development, flexibility and recognition, but "LocktonLife" is so much more than that. Giving back is an essential part of our culture because the communities we live and work in are what bring us together. Just as Jack believed when he founded Lockton more than 50 years ago, success means doing the right thing not just for clients but also for each other and those in need.

## *Creative thinking*

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**WHATEVER RISKS YOU FACE, WE UNLOCK OPPORTUNITIES TO HELP YOU MOVE FORWARD.**

We strive to understand the “why” and “how” behind your business so we can deliver the most efficient, cutting-edge solutions in the marketplace.

Your enterprise is one of a kind, so don’t settle for off-the-shelf answers. From empowering and encouraging creative ideas to passionately advocating for our clients, we deliver innovative, agile solutions unlike anyone else. Independence for us equals opportunity for you.

## *Trusted partners*

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**WHEN IT HAPPENS TO YOU, IT HAPPENS TO US.** We embrace your challenges as our own, and together we work to proactively achieve long-term goals — while protecting your interests at every turn. Lockton is not just your broker for risk management, insurance, employee benefits consulting and retirement services; we are your partner.

Our talented team of experts works to understand your business and offer strategic solutions, but we don’t stop there. As a consultative partner, we continue to look for new ways to align with and help meet your goals. When you choose Lockton, you are choosing a team who puts your business results first, not ours.



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*Our founder, Jack Lockton, believed that a  
fierce commitment to private ownership  
instills every employee with a single-minded  
focus on delivering results for clients.*

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[View our manifesto](#)



**LOCKTON®**

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