Joe Valerio Joins The Baldwin Group as Chief Operating Officer, Insurance Advisory Solutions

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TAMPA, Fla.--(BUSINESS WIRE)--Nov. 5, 2025-- The Baldwin Group (“Baldwin” or the “Company”) (NASDAQ: BWIN) announced today that Joe Valerio will be joining the firm as Chief Operating Officer (COO), Insurance Advisory Solutions (IAS), the firm’s retail property and casualty and employee benefits brokerage business.

This press release features multimedia. View the full release here: https://www.businesswire.com/news/home/20251105039843/en/

Joe Valerio

In this new role, Mr. Valerio will be responsible for continuing to drive operational excellence and vanguard client experience outcomes across IAS as the firm remains focused on delivering industry-leading results and client experiences. He will report to Dan Galbraith, President, The Baldwin Group and Chief Executive Officer, Retail Brokerage Operations.

“As a recognized and experienced insurance executive, Joe brings nearly 30 years of industry experience and we are thrilled that he will be joining our leadership team as we continue to accelerate scalable growth, market leadership, and industry-defining client experiences. Joe is a recognized transformational industry leader possessing unique insights, a competitive attitude and a winning track record for delivering operational excellence and growth outcomes. He will partner with myself and our IAS leaders to set and achieve strategic revenue goals and ensure operational execution is aligned with our firm’s mission, vision, culture and financial targets,” said Galbraith.

Most recently, Mr. Valerio served as Division Leader, Western Division, for World Insurance Associates, LLC. Prior to World Insurance, he served as Chief Operating Officer for the CRB North America Industry Verticals Division at Willis Towers Watson.

Joe holds a Master of Business Administration degree with a concentration in Finance and Strategic Management from Villanova University and a Bachelor of Arts in Economics from the University of Pennsylvania.

ABOUT THE BALDWIN GROUP

The Baldwin Group, the brand name for The Baldwin Insurance Group, Inc.(NASDAQ: BWIN) (“Baldwin”) and its affiliates, is an independent insurance distribution firm providing indispensable expertise and insights that strive to give our clients the confidence to pursue their purpose, passion, and dreams. As a team of dedicated entrepreneurs and insurance professionals, we have come together to help protect the possible for our clients. We do this by delivering bespoke client solutions, services, and innovation through our comprehensive and tailored approach to risk management, insurance, and employee benefits. We support our clients, colleagues, insurance company partners, and communities through the deployment of vanguard resources and capital to drive our organic and inorganic growth. The Baldwin Group proudly represents more than three million clients across the United States and internationally. For more information, please visit www.baldwin.com.

NOTE REGARDING FORWARD-LOOKING STATEMENTS

This press release may contain various “forward-looking statements” within the meaning of the Private Securities Litigation Reform Act of 1995, which represent Baldwin’s expectations or beliefs concerning future events. Forward-looking statements are statements other than historical facts and may include statements that address our future operating, financial or business performance or Baldwin’s strategies or expectations. In some cases, you can identify these statements by forward-looking words such as “may,” “might,” “will,” “should,” “expects,” “plans,” “anticipates,” “believes,” “estimates,” “predicts,” “projects,” “potential,” “outlook” or “continue,” or the negative of these terms or other comparable terminology. Forward-looking statements are based on management’s current expectations and beliefs and involve significant risks and uncertainties that could cause actual results, developments and business decisions to differ materially from those contemplated by these statements.

Factors that could cause actual results or performance to differ from the expectations expressed or implied in such forward-looking statements include, but are not limited to, those described under the caption “Risk Factors” in Baldwin’s Annual Report on Form 10-K for the year ended December 31, 2024 and in Baldwin’s other filings with the U.S. Securities and Exchange Commission (the “SEC”), which are available free of charge on the SEC’s website at: www.sec.gov, including those risks and other factors relevant to the business, financial condition and results of operations of Baldwin. Should one or more of these risks or uncertainties materialize, or should underlying assumptions prove incorrect, actual results may vary materially from those indicated. All forward-looking statements and all subsequent written and oral forward-looking statements attributable to Baldwin or to persons acting on behalf of Baldwin are expressly qualified in their entirety by reference to these risks and uncertainties. You should not place undue reliance on forward-looking statements. Forward-looking statements speak only as of the date they are made, and Baldwin does

not undertake any obligation to update them in light of new information, future developments or otherwise, except as may be required under applicable law.

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