



The Baldwin Group Announces Leadership Appointments in its Insurance Advisory Solutions Segment

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Erin Lynch and Jeff Hughes to lead Specialty and Middle Market Operations, Respectively

TAMPA, Fla.--(BUSINESS WIRE)--Jan. 5, 2026-- The Baldwin Group ("Baldwin" or the "Company") (NASDAQ: BWIN) today announced leadership appointments in its Insurance Advisory Solutions (IAS) segment, 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/20260105379476/en/>



Joe Valerio, Chief Operating Officer, The Baldwin Group's Insurance Advisory Solutions segment

Following The Baldwin Group's recently closed merger with [CAC Group](#), Erin Lynch has been named President of Specialty Insurance for the IAS business segment. In this

role, Ms. Lynch will have executive oversight of the segment's extensive platform of industry practices and product specialties, ensuring the full power of the organization's deep expertise is brought to bear to serve clients with complex risk management needs. Ms. Lynch will lead the strategic planning and continued expansion of Baldwin's sector-specific offerings and product capabilities.

Jeff Hughes has been appointed President of Middle Market Insurance for the IAS business segment. In this role, Mr. Hughes will lead the firm's middle market platform serving the employee benefits and commercial insurance needs of business clients through an extensive regional network spanning all major markets across the United States. He will oversee middle market growth strategies designed to holistically deliver more advanced solutions to a broader base of business clients.

Joe Valerio, recently appointed [Chief Operating Officer of IAS](#), will continue in his current role with oversight of the segment's client experience, broking and placement, and national operations functions. His organization will have responsibility for deploying a consistent and efficient operating model across the entire IAS segment.

Ms. Lynch, Mr. Hughes, and Mr. Valerio will report to Dan Galbraith, President, The Baldwin Group and CEO, Retail Brokerage Operations.

"The Baldwin Group's merger with CAC Group unites two firms recognized for industry-leading growth, exceptional talent, and award-winning cultures. These leadership appointments represent the first step in a thoughtful combination to deliver the best of each brand through a structure that can efficiently serve the widest range of clients regardless of complexity, size, or geography," said Mr. Galbraith. "Erin, Jeff, and Joe are dynamic and proven leaders, well-aligned to drive the exciting next phase of the firm's growth."

ABOUT THE BALDWIN GROUP

The Baldwin Group, the brand name for The Baldwin Insurance Group, Inc. (NASDAQ: BWIN) 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 The Baldwin Group'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 The Baldwin Group's strategies, expectations, anticipated achievements or ability to raise or refinance debt. 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, the risk that we will not be able to incur the transactions described herein in a timely manner, and the risk that we will be unable to satisfy the conditions to the closing of the transactions described herein. 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 The Baldwin Group or to persons acting on behalf of The Baldwin Group 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.

Executive Bios Addendum

Erin Lynch Bio

Erin Lynch is President of Specialty Insurance for The Baldwin Group's Insurance Advisory Solutions (IAS) business segment, where she provides executive oversight of industry practices and product specialties to ensure the firm's deep expertise is fully leveraged to address clients' most complex risk management needs. Previously, she served as Chief Executive Officer of CAC Group, leading with a focus on operational excellence, data-driven decision-making, and a people-first culture. Earlier in her career, Ms. Lynch led the CAC Specialty Natural Resources Division, partnering with some of the world's largest independent power companies and utilities to design and steward global risk management programs. She has been recognized twice as a *Risk & Insurance* Power Broker and honored as a Woman to Watch by *Business Insurance* and an Elite Woman by *Insurance Business America*.

Jeff Hughes Bio

Jeff Hughes is President of Middle Market Insurance for The Baldwin Group's IAS Business segment, where he has national responsibility for how Baldwin's middle market platform serves employee benefits and commercial insurance business clients across the country and advances its ability to deliver more holistic solutions. Most recently, Mr. Hughes served as Baldwin's Regional President, Southeast Region with P&L responsibility for the firm across the southeast region of the U.S. He joined Baldwin in 2019 as the Managing Director of Employee Benefits in the region, where he led the team to become a top-performing business. Before joining Baldwin, Mr. Hughes spent 14 years in the service industry working for industry-leading corporations Cintas, Shred-It, and Stericycle.

Joe Valerio Bio

Joe Valerio is the Chief Operating Officer for The Baldwin Group's Insurance Advisory Solutions (IAS) segment with oversight of IAS's client experience, broking and placement, and national operations functions with responsibility for deploying a consistent and efficient operating model. Most recently, Mr. Valerio served as Division Leader, Western Division, for World Insurance Associates, LLC where he drove revenue growth and margin expansion through disciplined sale execution and operational excellence across 27 offices across 13 states. Prior to World Insurance, he served as Chief Operating Officer for the CRB North America Industry Verticals Division at Willis Towers Watson where he guided a team of nearly 3,000 colleagues across diverse functions, generating annual revenue of more than \$1.2 billion.

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