



## The Baldwin Group Announces Future Leadership Transition in its Underwriting, Capacity, and Technology Solutions Segment

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*Amy Carlisle to be named CEO; Jim Roche to become Executive Chairman*

TAMPA, Fla.--(BUSINESS WIRE)--Feb. 27, 2026-- The Baldwin Group ("Baldwin" or the "Company") (NASDAQ: BWIN), a leading independent insurance brokerage and advisory firm delivering tailored insurance solutions to a wide range of personal and commercial clients, today announced a long-planned leadership transition within its Underwriting, Capacity, & Technology Solutions ("UCTS") operating group, effective January 1, 2027. Amy Carlisle will become Chief Executive Officer of UCTS, succeeding Jim Roche, who will assume the role of Executive Chairman, UCTS for a period of three years. The transition reflects a deliberate, multi-year succession plan designed to ensure continuity and support the long-term strength and performance of the UCTS business.

As CEO, UCTS, Ms. Carlisle will oversee the segment's MGA and wholesale businesses, capacity operations, and finance and accounting functions. She will report to Chief Executive Officer, Trevor Baldwin, and serve on the Company's executive leadership team. Ms. Carlisle has spent the past four years helping build and scale the Company's MGA platform, MSI. Under her leadership the business has doubled in size, reflecting her ability to drive disciplined growth, strengthen carrier and distribution relationships, and significantly expand and diversify MSI's product portfolio.

In her earlier tenure with the firm, Ms. Carlisle served as Head of Product Management at MSI, where she led product optimization, actuarial oversight, and MGA product development. Prior to joining The Baldwin Group, she held senior leadership roles at Liberty Mutual, spanning both personal and commercial lines businesses.

As Executive Chairman, UCTS, Mr. Roche will remain available to advise the Company on the future direction of the UCTS business. He will continue to support several firm priorities on which he has previously worked in different capacities, including the firm's long-term strategy around reciprocal exchange offerings, the UCTS technology roadmap, the rapid adoption of AI and the platforms that support multiple high-performing UCTS businesses. His continued guidance in these areas ensures continuity in supporting Amy's leadership over the strategic and operational foundations that have contributed to UCTS's strong performance over time.

"Amy brings a proven track record of performance, disciplined execution, and deep expertise that uniquely position her to lead UCTS through its next chapter of growth," said Trevor Baldwin, Chief Executive Officer of The Baldwin Group. "Jim has built an extraordinary business and will continue to play an important supporting role across our organization. His transition to Executive Chairman ensures continuity in the areas where he helps the firm drive the greatest long-term strategic value, while empowering Amy to lead UCTS forward with the vision and operational excellence she has demonstrated throughout her time at The Baldwin Group."

### **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](http://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 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, 2025 and in Baldwin's other filings with the SEC, which are available free of charge on the SEC's website at: [www.sec.gov](http://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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