



The Baldwin Group Announces Expanded Enterprise Relationship with Anthropic to Accelerate Scaled Deployment of Advanced AI Across Insurance Operations

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Firm-wide rollout of Claude to enhance colleague productivity, streamline complex workflows, and deliver measurable client impact

TAMPA, Fla.--(BUSINESS WIRE)--May 4, 2026-- The Baldwin Group ("Baldwin" or the "Company") (NASDAQ: BWIN), a leading independent insurance brokerage and advisory firm, today announced an expanded enterprise relationship with Anthropic to deploy its advanced AI assistant, Claude, across the firm. This is a significant acceleration of the company's AI-driven transformation and a strengthening of its commitment to delivering differentiated client and colleague experiences at scale.

Baldwin will integrate Claude across its segments and functional business groups, equipping advisors, client experience, and operational leaders with a secure, enterprise-grade AI platform designed to enhance productivity, accelerate decision-making, and support complex, end-to-end workflows. This agreement follows several months of active deployment of Claude within targeted areas of the business, where it has delivered measurable improvements in the quality of client-facing insights, productivity, and workflow efficiency.

Baldwin will look to Claude to augment the deep expertise of the firm's professionals, who bring an exceptional level of insight, tailored client service, and impactful risk management solutions to clients and the broader industry every day. During the firm-wide rollout, initial use cases will focus on enabling frontline advisors and client teams to more efficiently analyze risk, synthesize client information, and support tailored insurance solutions, while also empowering business leaders to optimize operational processes through AI-driven insights and automation. Over time, Claude's capabilities will extend to more advanced, agentic workflows that support end-to-end process execution across Baldwin's platform.

"AI represents a fundamental shift in how we empower our colleagues to serve clients, elevating and amplifying what our colleagues already do best," said Trevor Baldwin, Chief Executive Officer of The Baldwin Group. "The best professionals in our industry don't just facilitate insurance transactions — they synthesize complex risk, anticipate what clients haven't asked yet, and translate that into solutions. Claude doesn't replace that judgment; it gives our colleagues more time and better information to apply it. We've spent the last several months proving this works in targeted parts of the business. Scaling it across Baldwin is the next step in compounding our productivity advantage."

Unlike earlier-generation tools, Claude enables both advanced reasoning and action-taking capabilities across workflows, allowing Baldwin teams to move from insights to execution within a unified environment. The platform will integrate with Baldwin's existing technology ecosystem, supporting secure data handling and enabling more seamless collaboration across teams.

"Technology and AI are only as valuable as the business outcomes they enable," said Sandeep Bajaj, Chief Technology Officer, Retail Brokerage, at The Baldwin Group. "Our approach is grounded in delivering measurable impact, whether that's accelerating workflows, improving decision precision, or enhancing the client experience."

"This initiative builds on our existing technology strategy, which prioritizes scalable platforms over siloed tools and emphasizes long-term value creation," said Ryan Fauls, Chief Technology Officer, Underwriting, Capacity and Technology Solutions (UCTS) at Baldwin. "Claude provides a secure, scalable platform that allows us to truly transform how work gets done."

By aligning AI deployment with specific business use cases and client needs, Baldwin aims to drive sustained competitive advantage while delivering tangible impact across its operations. The relationship with Anthropic also reinforces Baldwin's commitment to responsible AI adoption, with a focus on governance, training, and cross-functional collaboration.

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 Baldwin's 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 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 Baldwin's business, financial condition and results of operations. 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 Baldwin's behalf 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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