

Higginbotham Teams Up with Financial Services Firm Cassidy & Company of Tampa, FL

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(Fort Worth, Texas) – Higginbotham, the largest independent insurance, financial and HR services firm headquartered in Texas and one of the top firms in the country, has joined forces with Cassidy & Company of Tampa, FL, to further strengthen its specialty life insurance planning expertise and provide additional support to partner offices in Florida, Tennessee, Mississippi, and beyond.

Higginbotham Chairman and CEO Rusty Reid looks to the future with a platform of strategic growth in targeted regions like the Southeast, where Higginbotham and Higginbotham partner offices in cities like Memphis, TN, Tampa, FL, and Brookhaven, MS, provide a robust regional footprint. With the addition of specialty firm Cassidy & Company, Reid has moved to add sophisticated financial services support to the regional mix.

“When we expanded to the west some years ago, we collaborated with Paradigm Gilbert, a specialty financial services firm in Los Angeles,” said Reid. “That partnership allowed us to offer in-depth life insurance planning expertise to clients throughout the region. When we asked them to recommend a similarly knowledgeable firm to support our Southeast expansion, they knew just the right people — Cassidy & Company.”

“As fellow owner-firms in Lion Street®, a national network of independent life insurance and wealth planning firms, we’ve known the folks at Paradigm Gilbert for years,” said Cassidy & Company President William A. Cassidy. “Like them, we have decades of experience navigating the ins-and-outs of life insurance and financial planning for business owners and high-net-worth individuals and families. Now we’re excited to join them under the Higginbotham umbrella, bringing our knowledge and expertise to partner offices and clients here in the Southeast.”

Cassidy & Company Vice President and Financial Advisor Matt Woodard noted that the relationship with Higginbotham will also provide Cassidy & Company clients with reciprocal services from the regional and national offices.

“Higginbotham has an impressive scope and presence, and a robust platform of personal and commercial coverages and employee benefits,” said Woodard. “Our clients have those needs as well and we look forward to connecting them with the practice area specialists we’ve been talking to at Higginbotham.”

Cassidy & Company Director of Operations Christina Magero spoke about the opportunities for team and career development offered by the new relationship.

“Being part of a larger firm offers tremendous opportunity for career growth,” said Magero. “When that firm also has great benefits and is employee-owned like Higginbotham, you’re getting a higher job satisfaction, top-tier support — and a real stake in your own future.”

Speaking of that future, Cassidy concluded, “This partnership is going to allow us to significantly grow our market share and offer different services even within the life insurance space. The proprietary offerings now available to us through Higginbotham will enhance our existing client relationships and give us the opportunity to expand our reach, meeting new clients, learning about their needs, and delivering the outcomes they seek.”

About Cassidy & Company

Cassidy & Company of Tampa, FL, serves high-net worth individuals, family offices, business owners, and corporate clients, helping them create, protect, and distribute financial legacies through creative estate structures and custom-designed life insurance strategies. At Cassidy & Company, industry expertise and knowledge combine with integrity, client transparency, and open communication to provide innovative and practical

solutions to client needs. The Cassidy & Company mission is simple: match the unique needs of their clients with the right solutions and strategies to create enduring wealth for generations to come.

Cassidy & Company is an owner-firm in [Lion Street®](#), an elite national network representing 200+ independent firms and 800+ financial professionals, providing sophisticated life insurance and wealth planning solutions.

Visit cassidy-co.com for more information.

About Higginbotham

Higginbotham is a single source solution for insurance, financial and HR/employee benefits services. The employee-owned firm was established in 1948 and ranks by revenue today as the nation's 20th largest independent insurance brokerage. Based in Fort Worth, Texas, Higginbotham serves businesses and individuals through locations across the nation. The firm specializes in tailoring programs to meet each client's unique needs, and in standing by those programs with their Day Two Services®, which provide proactive customer support through the life of each policy.

Higginbotham is a values-driven firm that strives to be family to employees, accountable to clients, teammates to carriers, and generous to communities.

Visit higginbotham.com for more information.