

Relation Insurance Acquires Whitney Oaks Insurance

Chicago, Illinois, September 23, 2024 — Relation Insurance Services (“Relation”) acquired the assets of [Whitney Oaks Insurance Services, Inc.](#) (“Whitney Oaks”). The transaction went into effect on August 30, 2024; terms of the transaction were not disclosed.

“We joined Relation knowing that this partnership would enable us to better serve our clients,” said Phil Castro, Vice President of Whitney Oaks. “Relation’s national resources and broad network of carrier relationships truly offer our clients the very best coverage options.”

Specializing in construction firms and contractors, [Whitney Oaks is based in Roseville, California.](#) Vice Presidents Phil Castro and Mark Diele will continue managing that office as a valuable part of the Relation family.

“Whitney Oaks has built an outstanding reputation in their community and Relation is proud to welcome them aboard,” said Tim Hall, Chief Executive Officer for Relation. “Their team brings tremendous long-term relationships as well as experience in commercial and personal insurance solutions to Relation. We are excited to welcome them to our team.”

About Relation’s Mergers & Acquisitions

Relation Insurance Services is actively seeking partnerships to expand its offerings, industry expertise, and geographic footprint. Relation offers a seat at the table to insurance entrepreneurs with equity ownership opportunities and a people-first approach that optimizes outcomes for employees and clients. For more information on joining the Relation family of brands, visit [our partner page.](#)

About Relation Insurance Services

Relation Insurance Services is an insurance brokerage firm that offers superior risk management and benefits consulting services across the United States. It is ranked by Insurance Journal within the top 25 largest agencies in the country by revenue and has approximately 1,350 employees across more than 137 locations nationwide. Relation is a privately held corporation backed by Aquiline Capital Partners, a private equity firm based in New York and London investing in businesses globally across financial services and technology. Visit: [About Us](#) page for more information.

M&A CONTACTS

Nicolas Luque, Senior Director M&A

Relation Insurance Services

P: 312-690-4146

E: nicolas.luque@relationinsurance.com

Scott Borchert, Director M&A

Relation Insurance Services

P: 312-870-9263

E: scott.borchert@relationinsurance.com