

## PRESS RELEASE

Munich, 10 October 2023

# GÖRG advises Summitas Gruppe on the takeover of EASiE AG, the second time a GÖRG team has advised on an insurance broker acquisition

**GÖRG Partnerschaft von Rechtsanwälten mbB, under the leadership of partner Dr. Philipp Grzimek LL.M, advised Summitas Gruppe GmbH on the takeover of EASiE Assekuranzmakler-AG. Following the acquisition of Münchener Versicherungsmakler GmbH in July 2023, the service partner for insurance brokers is once again being advised by a GÖRG team.**

EASiE Assekuranzmakler-AG, based in Vellmar in the state of Hesse, focuses primarily on the takeover of smaller brokerage houses whose owners remain in the company for a transitional period of three to five years. This forms part of a succession arrangement and accompanies the integration process. EASiE AG boasts 40 years of industry experience through its board member Michael Moog.

Commenting on acquiring another insurance broker, Stephan Ommerborn, Managing Director of Summitas Gruppe, explains: "With the investment in EASiE AG, Summitas Gruppe has arrived in Central Germany. We will create a regional hub through further acquisitions thanks to Mr Moog's local expertise and position."

The purchase by Summitas puts EASiE in a position to benefit from the opportunities offered by the platform technology of Summitas' partner company JDC Group. Within the Summitas partnered model, EASiE will continue to focus sales-wise on the takeover of brokerage companies as part of the succession process, while at the same time driving necessary organic growth.

"We are convinced that we have found the right partner in Summitas Group to positively shape the digital transformation, especially for organic area growth," comments EASiE board member Michael Moog. "At the same time, we have a strong partner to help acquire further, primarily regionally active brokerage houses in succession planning."

The transaction was realised on 29 September 2023. EASiE Assekuranzmakler-AG will remain an independent company at the Vellmar location. All parties agreed not to disclose the financial details of the transaction.

For Summitas Gruppe GmbH, purchasing EASiE Assekuranzmakler-AG is the next step on its growth path and the associated expansion of its market position through strategic takeovers.

### Advisors Summitas Gruppe GmbH

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## About Summitas Gruppe GmbH

Summitas Gruppe GmbH is a trusted partner for client-oriented, established and aspiring insurance brokerage firms. Headquartered in Munich, the company offers access to significant capital and other resources, deep industry expertise and a well-positioned, technology-enabled brokerage platform. Summitas Gruppe was formed in 2022 as a joint venture between Bain Capital Insurance, Canada Life Irish Holding Company Limited, a subsidiary of Great-West Lifeco, and JDC Group AG.

## About EASiE Assekuranzmakler-AG

The company was founded back in 2009 by the current board member Michael Moog. Since then, in addition to the traditional brokerage business, the company has pursued the business field of taking over smaller brokerage houses, including their owners, who are still undergoing the integration process for a certain period of time as part of succession arrangements. The regional focus of EASiE AG is on northern Hesse, southern Lower Saxony and parts of Thuringia. The company currently manages around 8,500 contracts for a good 2,300 customers. The current portfolio volume across all lines of business is just under six million euros.

## Communications & Marketing

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## About GÖRG

GÖRG is one of Germany's leading and independent business law firms.

With around 350 lawyers and tax advisors in Berlin, Cologne, Frankfurt am Main, Hamburg and Munich, we advise well-known domestic and foreign businesses from all areas of industry, banking, real estate, trade, media and services on all core areas of business law.

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