

# HCG

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The Heffernan Group



30<sup>th</sup>  
anniversary

# TOC

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- 4 ICA Cristo Rey Academy
- 6 10 Strategies for Retirement Planning in a Volatile Market
- 8 The Present and Future of Telematics in Trucking
- 10 Our Partners
- 28 Heffernan Financials
- 30 Heffernan's Capabilities
- 32 Our Top 3 Volunteers
- 34 Corporate Philanthropy
- 36 30th Anniversary Celebration
- 38 Four Chief Wind Makers on the Heffernan Voyage
- 42 College Track
- 43 Heffernan Charitable Contributions Timeline



## 30 Years of Independence

For the Heffernan Group, 2018 was an exciting year! We celebrated our company's 30th anniversary with a fundraising event in Richmond, California. We raised over \$1.6 million, which was contributed to the Heffernan Foundation and will be deployed to support numerous nonprofits. We completed a transaction with Socius, one of our wholly owned subsidiaries, transitioning majority ownership to Socius employees. Our Group of affiliated companies remains strong, with the primary intent to continue providing various services throughout the insurance industry. Our founding philosophy still holds true today: to support a group of independent companies to create an environment where the employees of each individual company can make the best decisions for their clients.

Anchored by our largest company, Heffernan Insurance Brokers, we have created and maintained a culture of independence and loyalty to our employees and our clients. We remain proud to have preserved our dedication of giving back to those less fortunate. Heffernan Foundation has reaffirmed its emphasis on education; we hope to provide the tools and resources necessary to give others the opportunities to achieve the type of success many of us have been able to experience. As always, we thank you for your loyalty to the Group. You are the reason we work hard and put our best foot forward—all with a smile!

*F. Mike Heffernan*

30<sup>th</sup>  
anniversary

"Congratulations on an incredible 30 years! With more than two centuries of operations under our belt, we appreciate what it takes to succeed over the long haul—diligence, determination, and drive combined with a collaborative approach and innovative spirit. These are attributes Heffernan embodies every day. You are relentless in finding new ways to serve customers and collectively grow our businesses. We are proud and pleased at The Hartford that you've earned a spot among our company's very best partners. From our team to yours, congratulations again on achieving this important milestone—and here's to many more."

*Doug Elliot, President, The Hartford*

"Entrepreneurial flair, innovative solutions, customer service excellence, impeccable professionalism, and global capability with local intimacy reveal the hallmarks of the Heffernan value proposition...all executed with a team of experts that intrinsically love and enjoy the process. You are unique in your business model and progressively better across your history to this 30th year milestone. We at CNA have been honored to partner with you and look forward to sharing in your success for decades to come. Congratulations on this remarkable accomplishment."

*Dino E. Rubusto, Chairman and CEO, CNA Financial Corp.*