

Prizm Financial joins Acera Insurance, expands Acera Benefits division



CALGARY, July 27, 2023 — Prizm Financial Inc. has joined Acera Insurance Services Ltd.

This merger expands Acera Insurance's specialty Acera Benefits division, further positioning the independent brokerage as a leader in the Canadian group benefits market and broadening the customized benefits and retirement solutions it offers to clients across the country.

For over 25 years, Prizm Financial has specialized in negotiating and administering tailored group health and retirement solutions for businesses of all sizes as well as wealth management for high-net-worth individuals. The firm is headquartered in Calgary, AB, with a second location in Campbell River, BC.

"On behalf of Acera insurance, I am excited to welcome the talented professionals of Prizm Financial," says Tony Fairfield, President of Group Benefits, Acera Insurance. "This industry-leading team's dedication, knowledge and resources complements our efforts to expand the employee benefits, retirement and insurance solutions we provide across Canada."

This partnership demonstrates Acera Insurance's commitment to support independent and locally-owned brokerages in their efforts to increase scale while ensuring clients continue to receive the personalized, unbiased insurance solutions from the local team they have come to know and trust.

"As a family-run, independent firm that is focused on building lasting relationships with our clients, Prizm Financial has never compromised on the impartial and expert solutions we provide," says Jonathan Clarke, President of Prizm Financial. "We are excited to join an organization that shares these same values as we look to evolve and broaden the expertise and market access we can offer our clients."

As part of this partnership, Prizm Financial will fully transition to become Acera Benefits in the coming months.

Acera Benefits is an integrated benefits consulting team that helps Canadian employers design competitive, cost-effective and customized employee benefits plans that are flexible to an ever-changing health and wellness environment. As a specialty division of Acera Insurance, Acera Benefits is uniquely positioned to offer clients many value-added services not typically available through traditional benefits consultants.

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About Acera Insurance

Acera Insurance is one of the largest independent, employee-controlled brokerages in Canada. With 1,000 employees in over 60 offices across Canada, \$1 billion in gross written premium and over 550 employee owners, Acera Insurance provides custom insurance and risk management solutions for personal and commercial clients



nationwide, including comprehensive group benefits capabilities. Built upon the solid foundation of several award-winning firms, Acera Insurance brings greater value, expertise and resources to individuals, families and businesses across the country.

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