



ACQUISITION TESTIMONIAL

McCaleb-Metzler, Inc - Belle Haven, VA

By: David McCaleb, President

THE SITUATION

McCaleb-Metzler was founded by my grandfather in 1947. We served the Eastern Shore of Virginia as a general agency, primarily small commercial and personal P&C.



WHY SELL?

Markets and perpetuation. Regarding markets, we had grown to where we needed other carriers, but still weren't large enough to attract any serious partnerships. Regarding perpetuation, I didn't want the business to be dependent upon me. I'd seen too many companies close doors when something unexpected happened to the principal.



WHY BANKERS?

We spoke with other interested agencies. We chose Bankers because it just felt right. They weren't looking to break out our book and close our location but rather invest in the local area. Bankers also presented a straightforward easy-to-understand offer, the bulk of it being cash upfront.



THE RESULTS

It was the right decision for the agency, the Eastern Shore, and our employees. Our staff is paid more competitively and receives better benefits. The transition went as smoothly as expected but I anticipated challenges. They came but we worked through them all. Three years later, I am still happily employed and am glad I chose Bankers Insurance.

