

To Whom it May Help!

I had met with Mike a few years prior to divesting, to gain some insight into selling, but I wasn't ready to sell at that point in time. Mike said "no Problem" let me know when the time is right for you (no pressure).

A couple of years later, I decided it was time and after receiving several inquiries on my own and seeing that I wasn't sure which acquirer represented the best value proposition for my Brokerage, I again met with Mike. I informed him that I had several discussions with Stoneridge Insurance Brokers and that they seemed to be the right fit for me. Mike then told me everything he was going to require to review and begin the Marketing process & make it presentation ready. With his vast knowledge of market conditions, Mike sent some info to potential acquirers that had an appetite for my situation. Again, Mike's insight having an accounting background, as well as the experience of owning and selling his own Brokerage and many other Brokerages, proved invaluable. He agreed that Stoneridge's offer, with a few tweaks, was the best for my situation. I then felt comfortable that I was receiving the best value for my brokerage, which was very important to me.

I thought this would mean I was near the finish line but soon found out this was only the beginning and that's where Mike really shined. He knew what due diligence was required at what stage and anticipated what to get ready ahead of time. This really speeds up the process and keeps everything moving smoothly. The purchase deadline was met, downpayment received, Mike, we happily paid in full, and he still checks in to see if everything is ok, months later. (Who does that these days?). The fee represented tremendous value (and tax deductible) for a person that truly enjoys helping others.

I would not hesitate in recommending Mike Santiago, President of Santiago Consulting Inc. to represent potential vendors and I can be contacted at 403-888-6155 if you require any further information.

Greg Whiteley
President,
Asset Insurance Brokers