

## PRESS RELEASE

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# GÖRG advises Summitas Group on acquisition of Münchener Versicherungsmakler GmbH

**GÖRG Partnerschaft von Rechtsanwälten mbB, led by partner Dr. Philipp Grzimek LL.M, advised Summitas Gruppe GmbH on the acquisition of the shares of Münchener Versicherungsmakler GmbH. Through this strategic acquisition, Summitas Group is laying the foundation to build a large client portfolio and is also laying the foundation for the partnership model in the industry.**

As one of the leading insurance brokers in the Munich economic area, Münchener Versicherungsmakler GmbH has more than 40 years of experience and expertise in the insurance industry and is known as a representative of interests for industrial, commercial and private customers.

"The cooperation with Münchener Versicherungsmakler GmbH has created a great foundation for the Summitas Group," said Stephan Ommerborn, Managing Director of the Summitas Group. "The experience and the extensively diversified customer base of Münchener Versicherungsmakler GmbH as well as the common vision for the brokerage business of the future form a perfect pair."

The integration of Münchener Versicherungsmakler GmbH into Summitas Gruppe GmbH will help to create synergies and pool the resources of both companies in order to offer clients even more effective solutions.

"We are convinced that this takeover, the benefits of which we have weighed up for a long time, will allow us to implement the digital transformation more quickly and successfully and to strengthen the influence of our company, especially on coverage concepts and claims and benefits processing," emphasises Ulrich Schwarzmaier, Managing Director of Münchener Versicherungsmakler GmbH. "With the new shareholders, the foundation has been laid for another 40 years of successful activity in the interest of our customers." The two sole GmbH managing directors Adrian Potstada and Ulrich Schwarzmaier are already looking forward to further challenges.

The transaction became legally effective on 30 June 2023. Münchener Versicherungsmakler GmbH will remain an independent company with its "Unterhaching" location. The parties have agreed not to disclose financial details of the transaction.

Summitas Gruppe GmbH thus starts the planned growth course and strives to expand its own market position through strategic acquisitions. The acquisition of Münchener Versicherungsmakler GmbH is a first step on this path.

### Advisors Summitas Gruppe GmbH

#### **GÖRG Partnerschaft von Rechtsanwälten mbB**

Dr. Philipp Grzimek LL.M. (Lead, Partner, Corporate Law / M&A, Munich)

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## About Summitas Gruppe GmbH

Summitas Gruppe GmbH is a trusted partner for client-focused, established and emerging insurance brokerage firms. Headquartered in Munich, Germany, the company offers access to significant capital and other resources, deep industry expertise and a well-positioned, technology-enabled brokerage platform. Summitas Group 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 Münchener Versicherungsmakler GmbH

For decades, Münchener Versicherungsmakler GmbH has been a reliable and prudent partner for high-performance insurance concepts in the areas of non-personal insurance, personal insurance, company pension schemes (bAV) and company health insurance (bKV). It offers customised insurance solutions and thus a reliable partnership for industry, small and medium-sized businesses, freelancers and private individuals. Moreover, it enjoys an excellent reputation in the industry.

## Communications & Marketing

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## About GÖRG

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

With more than 300 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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