

**Disclosure Pursuant to the
City of Pasadena Taxpayer Protection Amendment
Pasadena City Charter, Article XVII**

Contractor/Organization hereby discloses its trustees, directors, partners, officers, and those with more than 10% equity, participation, or revenue interest in Contractor/Organization, as follows:

(If printing, please print legibly. Use additional sheets as necessary.)

1. Contractor/Organization Name:

Keenan & Associates

2. Type of Entity:

☒ non-government ☐ nonprofit 501(c)(3), (4), or (6)

3. Name(s) of trustees, directors, partners, officers of Contractor/Organization:

Keenan is owned by Arthur J Gallagher & Co., Following is Keenan's structure:

John Stephens, CEO Keenan

Ju Anderson, Employee Benefits Practice Leader

Laurie LoFranco, Employee Benefits Distribution Leader

Brad Keenan, Property & Casualty Practice Leader

4. Names of those with more than 10% equity, participation or revenue interest in Contractor/Organization:

Wholly owned by Gallagher, a publicly traded company (NYSE: AJG)

Prepared by: Laurie LoFranco

Title: Employee Benefits Distribution Leader

Phone: 310-212-0363

Date: May 17, 2026



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1. Contractor/Organization Name:

Alliant Insurance Services, Inc.

2. Type of Entity:

☒ non-government ☐ nonprofit 501(c)(3), (4), or (6)

3. Name(s) of trustees, directors, partners, officers of Contractor/Organization:

- Ilene Anders - SEVP, Chief Financial Officer
- Jennifer E. Baumann - SEVP, Chief Legal Officer, Corporate Secretary
- Julie Maloy - SVP, Director of Tax
- Neal Kounkel - FVP, Director of Agency and Producer Licensing
- P. Gregory Zimmer, Jr. - Chief Executive Officer
- Peter Arkley - SEVP, President- National Brokerage Group
- Peter Carpenter - SEVP, Chief Operating Officer
- Ralph S. Hurst - President
- Ted C. Filley - EVP, Treasurer
- Thomas W. Corbett - Executive Chairman

4. Names of those with more than 10% equity, participation or revenue interest in Contractor/Organization:

Alliant Insurance Services, Inc. is a privately held organization with a broadly distributed ownership structure. The firm is approximately 51% employee-owned, with the remaining ownership held by a private equity investment firm. No individual holds more than a 10% equity, participation, or revenue interest in the organization.

Prepared by: Tom Quirk

Title: First Vice President, Benefits Consultant

Phone: (949) 933-7228

Date: May 18, 2026



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1. Contractor/Organization Name: Marsh & McLennan Agency LLC

2. Type of Entity:
☐ non-government ☐ nonprofit 501(c)(3), (4), or (6)

3. Name(s) of trustees, directors, partners, officers of Contractor/Organization:

Executives of Marsh McLennan Agency: David Eslick, Matt Stadler, Bill Jeatran, Read Davis, Ben Newman, Luke Solomou, Sharon Werner, Trindl Reeves, Carrie Lonze, Alexandra von Ferstel, Kira Kimball, Kate Moher, Craig Reid, Pete Walther, Adam Balentine

Executive Committee of Marsh Companies: Paul Beswick, Katherine Brennan, John Doyle, Carmen Fernandez, John Jones, Dean Klisura, Mark McGivney, Ted Moynihan, Martin South, Nick Studer, Pat Tomlinson

4. Names of those with more than 10% equity, participation or revenue interest in Contractor/Organization:

None

Prepared by: Brian Hegarty

Title: President, Los Angeles

Phone: (213) 237-8010

Date: 05/18/2026



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1. Contractor/Organization Name: USI Insurance Services LLC

2. Type of Entity:

☒ non-government ☐ nonprofit 501(c)(3), (4), or (6)

3. Name(s) of trustees, directors, partners, officers of Contractor/Organization:

Michael J. Sicard - Chairman and CEO

Philip E. Larson III - President and COO

Mike Poulos - Senior Vice President and CFO

Ernest J Newborn - Senior Vice President, General Counsel

Kim Van Orman - Senior Vice President, CHRO

Stewart H. Gibson - Senior Vice President, CIO

4. Names of those with more than 10% equity, participation or revenue interest in Contractor/Organization:

Prepared by: Daniel Duzyk

Title: Vice President

Phone: 858.477.9227

Date: 5/15/2026

