

## **Baili McDonald of Brown & Brown of Tennessee, Inc. Among a Select Group To Be Named a Certified Advisor of Personal Insurance By Wharton and Chubb**

January 9, 2020

BRENTWOOD, TN., Jan. 9, 2020 -- Baili McDonald of Brown & Brown of Tennessee, Inc. has been awarded a Certified Advisor of Personal Insurance (CAPI) designation from the Aresty Institute of Executive Education at the Wharton School of the University of Pennsylvania and Chubb.

Baili is among a group of only 39 agents this year to receive the certification after completing a one-year intensive educational program on understanding the lifestyle and risk management and insurance needs of successful individuals and families. Created by Wharton and Chubb in 2014, the CAPI program is the first of its kind to focus on a specific client segment in the personal insurance marketplace.

“Because risk management and insurance needs of successful individuals and families can be complex, agents who have completed the CAPI program have demonstrated the highest level of skill and proficiency required to understand their successful clients’ holistic wealth management needs and to counsel them on how to protect their lifestyles,” said Mary Parsons, Executive Vice President, Sales and Distribution Leader, Chubb Personal Risk Services.

“We are extremely proud that Baili has received the prestigious CAPI designation,” said Ryan Rothrock, Executive Vice President of Brown & Brown of Tennessee. “This shows her incredible dedication to the insurance industry as well as her ongoing commitment to serving successful individual and families, who have a unique set of property and liability exposures created by their assets and lifestyle.”

Courses are taught by Wharton faculty, Chubb subject matter experts and other wealth management professionals. Agents received instruction on the Wharton campus at the University of Pennsylvania in Philadelphia, and through virtual classes, webcasts, reading assignments and other online activities throughout 2019. Participants also have ongoing access to fellow class members and program alumni, and upon graduation, must maintain their certification by completing annual continuing education requirements facilitated by Wharton.

### **About Chubb**

Chubb is the world's largest publicly traded property and casualty insurance company. With operations in 54 countries, Chubb provides commercial and personal property and casualty insurance, personal accident and supplemental health insurance, reinsurance and life insurance to a diverse group of clients. As an underwriting company, we assess, assume and manage risk with insight and discipline. We service and pay our claims fairly and promptly. The company is also defined by its extensive product and service offerings, broad distribution capabilities, exceptional financial strength and local operations globally. Parent company Chubb Limited is listed on the New York Stock Exchange (NYSE: CB) and is a component of the S&P 500 index. Chubb maintains executive offices in Zurich, New York, London, Paris and other locations, and employs more than 30,000 people worldwide. Additional information can be found at: [chubb.com](http://chubb.com).

### **About the Wharton School**

Founded in 1881 as the first collegiate business school, the Wharton School of the University of Pennsylvania is recognized globally for intellectual leadership and ongoing innovation across every major discipline of business education. With a broad global community one of the most published business school faculties, Wharton creates ongoing economic and social value around the world. The school has 5,000 undergraduates, MBA, Executive MBA, and doctoral students; more than 13,000 annual participants in executive education programs; and a powerful alumni network of 99,000 graduates.

### **About Brown & Brown, Inc.**

Brown & Brown, Inc. (NYSE: BRO) is a leading insurance brokerage firm, providing risk management solutions to individuals and businesses. With more than 80 years of proven success and thousands of teammates, we offer knowledge you can trust and strive to deliver superior customer service. For more information, please visit [bbtennessee.com](http://bbtennessee.com).

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