



### JOSH SIMERMAN

#### Head of EB Carrier Relations and Placement

#### Employee Benefits

#### PRIOR EXPERIENCE

- Willis Towers Watson
- Aetna
- Willis

Let's connect:

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As Head of Carrier Relations and Placement, Josh focuses on strengthening World's current insurance carrier and vendor relationships while developing and growing new partnerships and innovative solutions. He is responsible for leading several initiatives, including managing our top employee benefits carriers, vendors and general agents, centralizing acquisition appointments under a singular World appointment, and developing and maintaining placement tools and templates.

#### Expertise

Josh has more than 20 years of experience in employee benefits consulting and organization management, with a focus on optimizing client benefit programs in niche markets and building placement and analytics tools and processes. His insightful leveraging of insurance and healthcare marketplace relationships has also supported organizational growth.

At Willis Towers Watson his subject matter expertise in analytics, renewal and marketing, client service, and consulting enabled him to engage with clients on multiple levels.

His strength in benefit program harmonization and mergers and acquisitions led to his appointment as Health & Benefits Mergers and Acquisitions Service Leader for the West Region. Josh worked closely with the WTW M&A Group, overseeing their service teams to build and deliver efficient programs for private equity portfolio companies. The team achieved five consecutive years of 20% growth under his leadership.

Josh also served during this time as Arizona Benefits Practice Leader for four years, overseeing the 28-employee, \$12 million in revenue benefit brokerage & advisory practice which yielded consecutive years of double-digit growth.

Before joining WTW, Josh's success in client engagement and marketplace knowledge propelled him into national positions working with U.S.-based WTW consultants on escalated carrier negotiations, unique vendor solutions, and deeper WTW resource development. He developed a benchmarking tool that evaluated marketplace competitiveness, employer cost and design trends based on real-time client outcomes feedback. Josh also played a key role in the evaluation, selection, and development of the exchange marketplace during Willis' selection of Liazon as the exchange partner of choice, prior to its merger with Towers Watson.

While managing Aetna's existing Arizona business team, Josh saw firsthand how insurers approach risk from both an underwriting and financial position. Working with local, regional, and national brokers gave him a foundational understanding of how brokers can differentiate themselves and create unique ways to partner.

#### Education

**B.S. in Insurance and Risk Management** | Indiana State University