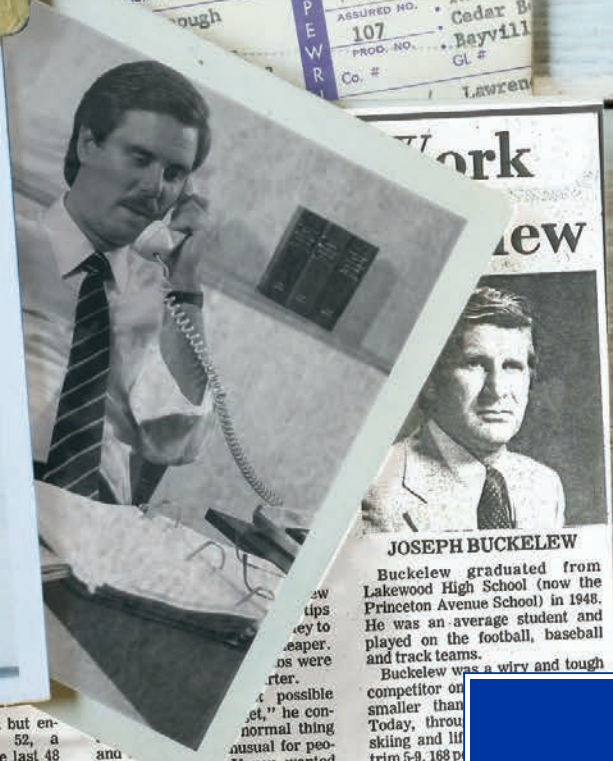




OVER 60 YEARS OF SUCCESS

OUR HISTORY



JOSEPH BUCKELEW

Bucklelew graduated from Lakewood High School (now the Princeton Avenue School) in 1948. He was an average student and played on the football, baseball and track teams.

Bucklelew was a wiry and tough competitor on the football field. He was smaller than most of the players. Today, through his love of skiing and life, he has become a successful businessman. While a player on the football team, he helped form the Lakewood Football League, which was the first of its kind for the YWCA and the community. He was a player on the basketball team and a coach.

Bucklelew earned a rare honor from the Lakewood P.B.A.

Bucklelew got into politics in 1963. He served on the township committee four years, was mayor in 1967, served an appointed term, and served on the school board term, and

The climb was difficult but enjoyable for Buckelew, 52, a Lakewood resident for the last 48 years. During those years Buckelew served as a Lakewood policeman, helped organize the Lakewood Biddy Basketball League, coached the township's first Pop Warner football team, served two years in the army military police and reared two sons, now both active in business. Buckelew's rise, though, required a lot of hard work. At one point he worked three jobs at one time, as a policeman and part-time mason and carpenter's helper. Commence Justice

CONNER STRONG & BUCKELEW

OUR HISTORY

1959

Morales, Potter & Buckelew, Inc. is founded after Joseph Buckelew purchases the agency, Morales and Potter. Fifty years, many mergers and acquisitions later, the firm name honors Joseph's involvement from the early days.

Morales, Potter & Buckelew, Inc.
Real Estate and Insurance

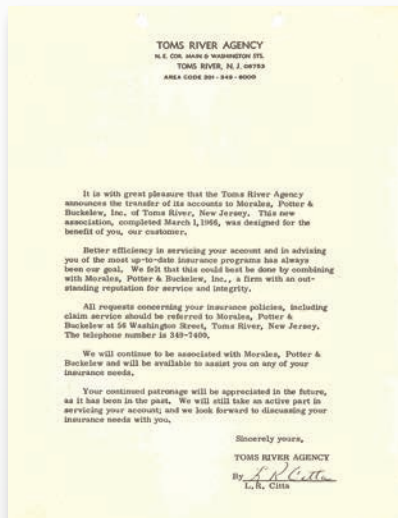


◀ Morales, Potter & Buckelew's first office was 56 Washington Street in Toms River, NJ.

► The Three Stooges, Big George Norcross and George Norcross, age 3, smile for a photograph at the Latin Casino in Philadelphia.



1966



▶ Morales, Potter & Buckelew, Inc. agrees to purchase the Toms River Agency on March 1, 1966.

► An original accounts list from Morales, Potter & Buckelew, Inc.



1970

In five years, Morales, Potter & Buckelew, Inc. acquires four agencies.

1967-1971

Phyllis Knowles, Beachwood Agency | December 1, 1967

Griggs Agency | December 1, 1968

Katherine Bahlburg Agency | October 1, 1969

Harold J. Fuccile Agency | August 15, 1971



Joseph Buckelew,
President Morales,
Potter & Buckelew

1971

Joseph Buckelew (second from right) and team celebrate the new offices of Morales, Potter & Buckelew, Inc. with a ribbon-cutting ceremony at 256 Route 37 in Toms River.

Joseph Buckelew and bookkeeper Sara Heller uncork a bottle of champagne celebrating the move to 231 Main Street, Toms River.



1975

It Took A Lot Of Work To Make Joseph Buckelew

By SAM CHRISTOPHER, Staff Writer
LAKESIDE — When you look at Joseph E. Buckelew you can't help but ask how did this nation's plate businessman/politician succeed to the top in so many fields.

"Sixty hour weeks, constant overtime and help from my family, assistance from friends, and pouring out your time and schedule," says the president of Morales, Potter and Buckelew, a Toms River insurance and real estate firm and Chairman of the Ocean County Republican Committee.

In 1969 Buckelew and his partner, dog since owner Stephen Lane, had an opportunity to acquire the Morales and Potter insurance and real estate firm. After starting with only a secretary and himself, Buckelew's business has expanded to include not only his secretary, but other employees.

The urge to grow and earn was a trait Buckelew seemed to be born with. As a youth he mowed grass, dug graves, and painted for the late Mrs. John Bucklew, of St. Mary of the Lake Church. He was a "jockey" at the seven-lane Plaza Playways on Clifton Avenue for a while a game.

"An ambitious kid," Buckelew recalled, "could make \$1 and tips in a day, jumping from one alley to the other. But things were cheaper. Cokes, candy bars and Nuts were a nickel, the movies a quarter."

"This was the best possible training a kid could get," he continued. "It was the hardest thing and certainly not unusual for people in our circle. If you wanted something, you did it."

Today, Buckelew attends at least 10 meetings a week plus many conferences but still finds time for the physical work because of time. "My wife Carol thinks I have two left hands. One time I fixed the plumbing and fixed the kitchen."

"Whatever success I have had can only happen in America," he continued. "You start with opportunities presented. I had help from friends like Steve Lane. In other countries it is hard to get out of a circle of life and improve yourself."

His advice to anyone interested in improving themselves is to have courage to go ahead — now. It takes courage, instinct and intuition, he said.

"I came along at the right period of time. Ocean County has grown tremendously and our businesses grow with it," he stated.

Buckelew graduated from Lakeside High School (now the Princeton Avenue School) in 1968. He was an average student and played on the football, basketball and track teams.

Buckelew was a wiry and tough competitor on the gridiron, much smaller than most teammates. Today, through golfing, jogging, sailing and lifting weights he is a trim 5-4, 165 pounds.

While a policeman, Buckelew helped form the Police Athletic League, which sponsored a dance band for mostly visible at the YWCA and sponsored youth projects. He got to 30 years as a player agent for the Bally Basketball League and is a coach.

Buckelew earned a rare honor from the Lakewood P.A.A. Buckelew got into politics in 1969. He served on the township committee four years, was mayor in 1987, served an appointed municipal school board term, and served three years as a firehouse and was director in 1970.

Buckelew and his childhood sweetheart, the former Carol Alpagiotto, a native of Lakewood, married in 1971. Their son Brian is Vice-president of Morales, Potter and Buckelew, and their son Kevin is assistant program director for WOXM-AM, Lakewood, and a disc jockey there.

Joseph Buckelew, then-president of Morales, Potter & Buckelew, is profiled to highlight his accomplishments as an athlete, a sergeant in the police force, a local politician and a successful businessman.

In 1979, George Norcross joined Zinman Grossman Lichtenstein Co., a Philadelphia-based insurance brokerage founded in 1890, where he began a lifelong business partnership and friendship with Bob Tanke.



KEYSTONE NATIONAL

In the early 1980s, the Zinman Group was purchased by E. H. Crump Companies and several years later George Norcross established Keystone National.



George E. Norcross, III
Chairman
Keystone National
Companies, Inc.



Robert Tanke
President
Keystone National
Companies, Inc.

1980

OUR HISTORY

1981



Morales, Potter & Buckelew, Inc. agrees to merge with the Benjamin Novins Agency on November 2, 1981.

January 20, 1983 - The *Ocean County Times-Observer* announces the move of Morales, Potter & Buckelew, Inc. to downtown Toms River. The paper names the agency as the largest insurance and real estate firm in Ocean County with more than \$10 million in premiums and more than 17,000 accounts.

OCEAN COUNTY TIMES-OBSERVER
THURSDAY, JANUARY 20, 1983 PAGE 5

A Bold Move Back Downtown

EXPANDING — Morales, Potter and Buckelew, Inc., probably the largest insurance and real estate firm in Ocean County, is expanding and moving its corporate headquarters to downtown Toms River.

The move will be accomplished late in March when extensive renovations and a 20 by 40 square foot addition are completed at the former Thomas A. Mathis, Inc. agency building at 201 Main St., which the firm has purchased.

That report came yesterday from Joseph E. Buckelew, company president, who said the relocation is ample proof of the firm's confidence in county paid downtown.

I understand the Mathis building improvements and purchase of a lot from the Chambers family, just north of and once the site of the Bradley Diner, represent an investment of about \$20,000. Work is underway on the addition and the whole inside of the Main Street landmark, once the printing base of the weekly Ocean County Sun and of Times of Thomas A. Mathis, the longtime county Republican leader, is being torn out by the Coastal Group, Celia Heck, with plans by architect John Leiferow, Toms River and Bay Head.

Buckelew, 41, is euphoric when he discusses the renovation.

"It is so complete, so thorough," he says. "There will be open skylights, the ceiling will be open, and the real estate department upstairs will be in a balcony effect looking down on the insurance operation."

There will be executive offices, two conference rooms, a work area for underwriters, a bookkeeping and computer room, individual offices for account executives, and lounges. The entrance will be on the north side where there will be a customer parking lot. Employee parking will be in three nearby lots by arrangements with the owners.

There will be 10,000 square feet of office space and a 2,500 square foot upstairs apartment will remain, Buckelew said. The building now is closed and the Mathis business has been shifted temporarily to the main office on Route 27 West and

Oakridge Parkway, the former Philip Mainstone building, Buckelew said. When renovations are finished, this building will be sold and the main office, the former Mathis business and the Novins Agency, now in a leased building at 1010 Roper Ave., will move into corporate headquarters downtown.

Buckelew bought the Novins business owned for years by former Dover Township Judge Ben Novins Nov. 2, 1981 and the Mathis business two weeks later.

The move will boost downtown business, Morales, Potter and Buckelew has 40 employees who will be based there within a month's time of 100 lawyers with whom the firm deals heavily.

"The location is just great and the area a good one for doing business," Buckelew boasted. "We are making a complete cycle. It started in 1960 when I bought Morales and Potter at 40 Washington St. downtown. Then we moved to Route 27 West on the outskirts and now we are happy to be back in the center of the county seat."

There was only one agent-owner, Buckelew, and one secretary when Buckelew made the purchase from Frank Morales and Reginald V. Potter, senior citizens, contrasting with the vibrant new owner, who decided he wanted his own business, rather than being a Lakewood police sergeant. The firm had \$10,000 worth of premiums. Today it has more than \$10 million in premiums and 17,000 accounts.

Some of the firm's key management directors are Carole Cocomello, executive vice-president and a certified insurance counselor; Buckelew's son Brian, a first vice-president, who has been with the firm since graduation in 1979 from the University of Miami; Maurice Hammond, account executive and coordinator of services; and Roger Buckelew, marketing director. Hammond is a retired Toms River Schools superintendent.

Buckelew, seeing tremendous potential in the county, says he seeks more acquisitions. "We are in an expansion mood and always willing to consider new businesses from our base in Toms River," he says. The firm also deals in surety and contract bonds, appraisals, life insurance and pensions.

A man with a long record of community civic service, Buckelew has other political and business interests. He is the county Republican chairman and county election board chairman. He is an owner and a member of WOMEN in Toms River and Lakewood, a director and vice-chairman of the Jersey Shore Savings and Loan board, and a partner in Lakewood Cable TV.

Buckelew, a personable person, enjoys being busy. He loves being with and meeting people. As to how he checks and protects his vast business/political empire, Buckelew says "you must remember I have a large excellent staff. They are really terrific."

1983



Two of the largest Ocean County insurance agencies, Morales, Potter & Buckelew, Inc. and the Cardamone Agency, agree to merge operations on July 12, 1983.

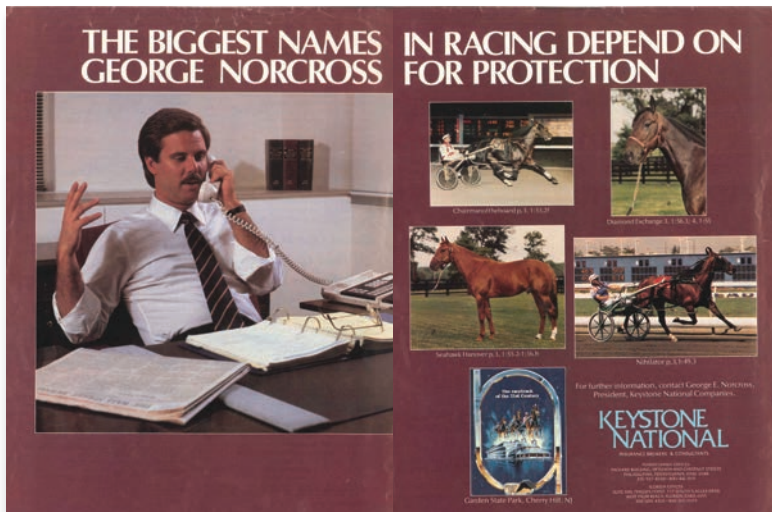
Morales, Potter & Buckelew is renamed to become Buckelew & Associates.



Buckelew & Associates' executives: Brian Buckelew, Vice President; Joseph Buckelew, President; and Carole Cocomello (Mack) pose for a photograph inside the company's Toms River office.

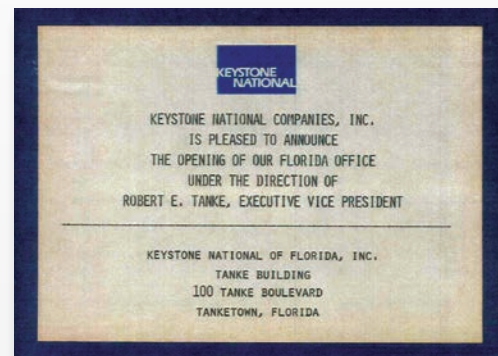


1985



◀ A Keystone National advertisement highlights George Norcross and his agency as the go-to firm for the horse racing industry. George is shown with two mainstays in his career – a phone and the *Wall Street Journal*.

▶ Keystone National expanded its presence by opening an office in Florida. Keystone's President, Bob Tanke, oversaw the operations of the new office located in "Tanketown, Florida."



Bucklew & Associates, headed by Joseph Buckelew, and Keystone National, headed by George Norcross, both agree to sell their operations to Commerce Bank. The combined entity becomes Commerce National Insurance Services.

Commerce Bancorp creates full-service insurance brokerage group.

Wednesday, July 31 1996



1996



The Philadelphia Inquirer

Thursday, August 1, 1996 ★ Philadelphia Media Network ★ \$1

Bank to Buy 2 Insurance Agencies

By Julie Stoiber
INQUIRER STAFF WRITER

Commerce Bancorp of Cherry Hill said yesterday it had entered into agreements to buy two South Jersey insurance brokerage firms, a deal valued at \$12.7 million that is believed to be one of the first sizable acquisitions of its kind in the region.

"We hope to build a big insurance group with this as a base," said Vernon W. Hill 2d, chairman of Commerce Bancorp, which has 55 offices in South Jersey and Philadelphia.

The U.S. Supreme Court has opened the door to the marriage of banking and insurance, most recently with the Barnett Bank decision in the spring, which struck down a Florida law that prevented banks from selling all forms of insurance.

"The banks are moving into this

area, given these decisions, pretty aggressively," said Leonard A. Bernstein, a banking lawyer with Reed Smith Shaw & McClay in Philadelphia.

Commerce Bancorp will merge Buckelew & Associates of Toms River and Keystone National Cos. of Cherry Hill under the banner of Commerce National. The subsidiary will have two offices, 65 employees and combined annual premiums of \$75 million, Hill said. It will offer a full range of commercial and personal insurance.

While Commerce Bancorp customers won't be able to walk up to a teller window and buy a homeowner's policy, they will be able to inquire about insurance at any branch and be referred to an agent

in the company, Hill said it was possible there might be agents in some branches.

Joseph Buckelew, who heads the Toms River agency, will be chairman of the subsidiary. George E. Norcross 3d, Keystone's chairman, will be president and CEO. Hill said he did not know of another such bank-insurance merger of this size in the area.

Commerce Bancorp, with assets in excess of \$2.6 billion, will issue about 550,000 shares of common stock to complete the transactions. The agreements are subject to regulatory approval in Pennsylvania and New Jersey and are expected to be finalized in the fall.

Commerce Bancorp closed at \$24, up \$1.25 on the Nasdaq.

OUR HISTORY

1996

1996-1999

After acquiring Buckelew & Associates and Keystone National, Commerce Bank acquires seven more agencies through 1999.

Chesley & Cline

December 6, 1996

The Morrissey Agency

January 1, 1997

Associated Insurance Management, Inc.

December 1, 1997

Reinhart & Associates

December 1, 1997

J.A. Montgomery Insurance

August 15, 1998

Mullaney Insurance Associates

November 15, 1999

William Handlan Associates

December 1, 1999



THE · MORRISSEY · AGENCY



Reinhart & Associates



HANDLAN ASSOCIATES, LLC
EMPLOYEE BENEFITS CONSULTANTS

1996-2007

Commerce Bancorp's insurance division went through several name changes throughout the years.



1996 - 2003



2003 - 2006



2006 - 2007

2000-2007

In eight years, Commerce Insurance Services acquires nine agencies.

Traber & Vreeland, Inc.

January 1, 2000

Maywood Agency

October 1, 2000

Fitzsimmons Insurance & Financial Services, Inc.

January 1, 2001

Business Training Systems

February 1, 2001

Brettler Financial Group

October 1, 2001

Sanford & Purvis Insurance

August 1, 2002

Porch Insurance Agency, Inc.

February 1, 2003

PERMA Risk Management Consulting Services

October 1, 2005

Consultants for Corporate Benefits, Inc.

February 1, 2007



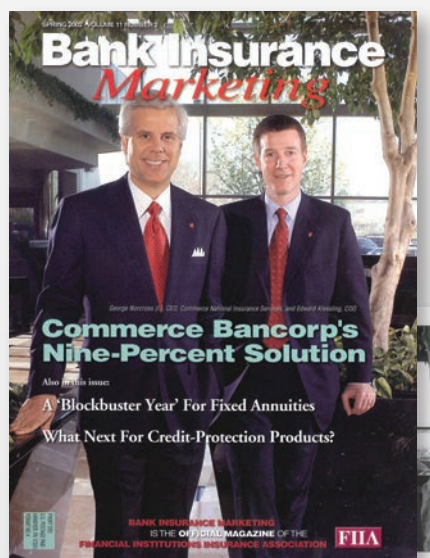
MAYWOOD AGENCY
Insurance



Commerce's Maverick Dedication to P&C

[illegible]

The firm welcomes its inaugural internship class to provide students with hands-on experience that prepares them for a future career in the insurance industry.

[illegible]

Spring 2002 – *Bank Insurance Marketing* details the unique nature of Commerce Bancorp's insurance division—headed by George Norcross.

OUR HISTORY

2005

November 2005 – Commerce Insurance Services announces the hiring of Michael Tiagwad as its new President.



FOR IMMEDIATE RELEASE

Michael Tiagwad Is New President of Commerce Insurance Services

CHERRY HILL, N.J. – Commerce Bancorp, Inc. announced today that Michael Tiagwad has been named to serve as President of Commerce Insurance Services, a wholly-owned subsidiary of Commerce Bank. Commerce Insurance Services is #22 on the list of top 100 largest insurance brokers in the United States as ranked by Business Insurance magazine.

2006



▲ March 31, 2006 – The Philadelphia Business Journal profiles George Norcross and Michael Tiagwad about the increasing pressures in the insurance industry.

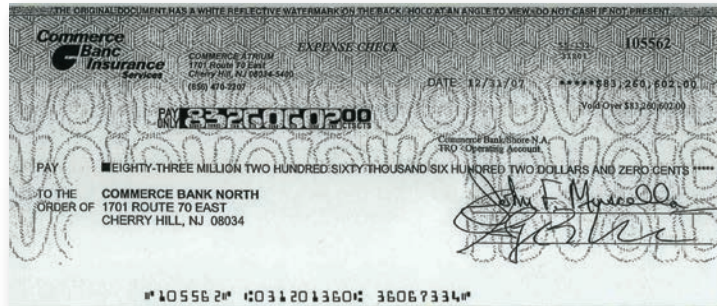
► July 2006 – NJBiz names Commerce Insurance Services the second largest property and casualty insurance brokerage in New Jersey with 407 producers. *Business Insurance* names Commerce Insurance Services the 23rd largest property and casualty insurance brokerage in the country based on earning \$88 million in revenue, a 3 percent increase from the previous year.

NEW JERSEY'S TOP Insurance Brokers			
Ranked by number of New Jersey producers			
Rank	Company	Producers	Revenue
1	Commerce Insurance Services	407	\$88,000,000
2	MetLife Insurance Co.	385	\$75,000,000
3	Prudential Insurance Co.	350	\$65,000,000

100 largest brokers of U.S. business			
Ranked by 2005 brokerage revenues generated by U.S.-based clients*			
Rank	Company	Revenue	% Change
1	MetLife Insurance Co.	\$1,200,000,000	+1.5%
2	Prudential Insurance Co.	\$1,100,000,000	+1.2%
3	Commerce Insurance Services	\$88,000,000	+3.0%

Commerce Insurance Services

December 31, 2007 – George Norcross and Mike Tiagwad agree to purchase Commerce Banc Insurance Services (after Commerce sold to TD Bank). The new company was named Commerce Insurance Services (no Red "C" in the logo).



2007



July 21, 2008 – Commerce Insurance Services is rebranded as Conner Strong. After six months as Commerce Insurance Services, the company is renamed Conner Strong Companies, Inc. The names Conner and Strong trace back to the ancestors of George and Sandy Norcross. Two years later, Joseph Buckelew's name was added to honor his lasting commitment to the firm.

2008



Alonzo Strong



Avery Conner



John Harvey Conner



Joseph Buckelew



June 1, 2009 – Conner Strong opens a new corporate headquarters in Marlton, New Jersey.

2009

OUR HISTORY

2010

PERMA

J.A. Montgomery
—Risk Control—

AIM

In 2010 and 2011, Conner Strong formally launched three affiliate companies – PERMA, J.A. Montgomery and AIM – designed to broaden the scope of services available to clients. This new structure allowed Conner Strong and its affiliates to concentrate on their respective core competencies, while delivering best-in-class results for all clients.

October 15, 2010 – For over 50 years, Conner Strong and predecessor companies have called Toms River home. To celebrate that lasting commitment, in 2010, the firm rebuilt its office space, creating a premiere work environment and top-notch client meeting facilities.



2011

CONNER
STRONG &
BUCKELEW

May 15, 2011 – The firm added the name "Buckelew" to the logo. The new name honors Mr. Joseph Buckelew, a man known for impeccable integrity, distinguished career and significant contributions to the industry and firm.

November 2012 – The firm moves into new offices in Two Liberty Place, a preeminent building in Philadelphia. The new office, features 25,000 square-feet of world-class space, becomes the firm's dual headquarters along with the office in Marlton, NJ.

CONNER STRONG
captive
STRATEGIES

Fall 2012 – Conner Strong Captive Strategies was launched as an independent affiliate of Conner Strong & Buckelew. The new affiliate was created to offer alternative risk solutions beyond the traditional insurance marketplace to clients with complex insurance needs.



2012



On June 7, 2013 Conner Strong & Buckelew held its inaugural Community Day. Employees participated in 11 events serving those in need throughout New Jersey and the Philadelphia region.

2013

April 2014 – Conner Strong & Buckelew expands its operations by opening an office in New York City.



2014



On June 4, 2015, Conner Strong & Buckelew is named one of the Healthiest Employers of Greater Philadelphia by the *Philadelphia Business Journal*, a testament to its strong wellness culture.

2015

OUR HISTORY

2016

The firm opens its first office in Boston and its seventh office overall. The new location focuses on serving the growing life sciences and construction markets within the Boston region.

2017

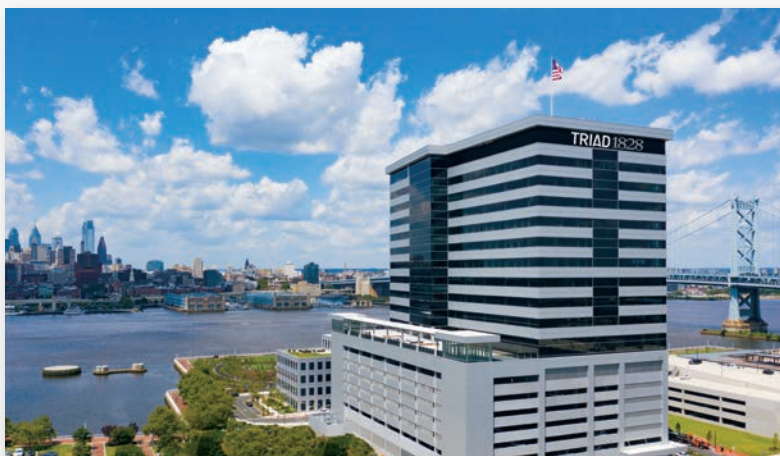


Conner Strong & Buckelew acquires Consolidated Risk Solutions (CR Solutions), an industry-leading wrap-up administration firm. This acquisition demonstrates the firm's commitment to strategically grow operations by investing in areas that set them apart from competitors.

2018

The New York operations moved to a new space in the heart of the financial district in Lower Manhattan. The move resulted from tremendous recent growth experienced throughout the region.

2019



The firm moves its new national headquarters to Camden, New Jersey. This move reinforces Conner Strong & Buckelew's continued commitment to South Jersey and the surrounding communities.



BrokerTech
Ventures

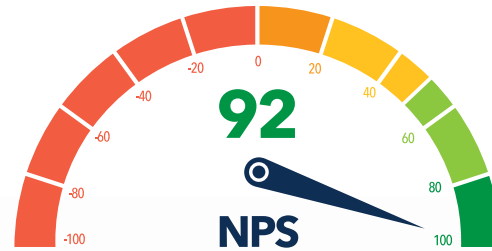
Conner Strong & Buckelew co-launches BrokerTech Ventures, the first insurance broker-led investor group and InsurTech accelerator program. Founders seek to work with and invest in innovators who are building new solutions to improve customer experiences and insurance operations



February 2019, Conner Strong & Buckelew acquires Capital Management Enterprises.

2021

Conner Strong & Buckelew achieves a world class Net Promoter Score of 92.

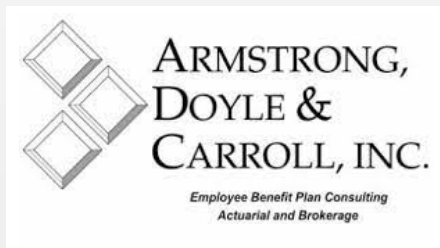


The firm launches the **CSB I&D Program** to create an environment of inclusion where everyone feels welcome, accountable, energized, and authentic.

The firm introduces Conner Strong Academy to further enhance and formalize the training and education programs for clients and employees.



2022



On September 6, 2022 the firm acquires Armstrong, Doyle & Carroll to expand the firm's footprint and deepen its capabilities.

Conner Strong & Buckelew Named to 2022 List of 100 Healthiest Workplaces in America by Healthiest Employers®.



OUR HISTORY

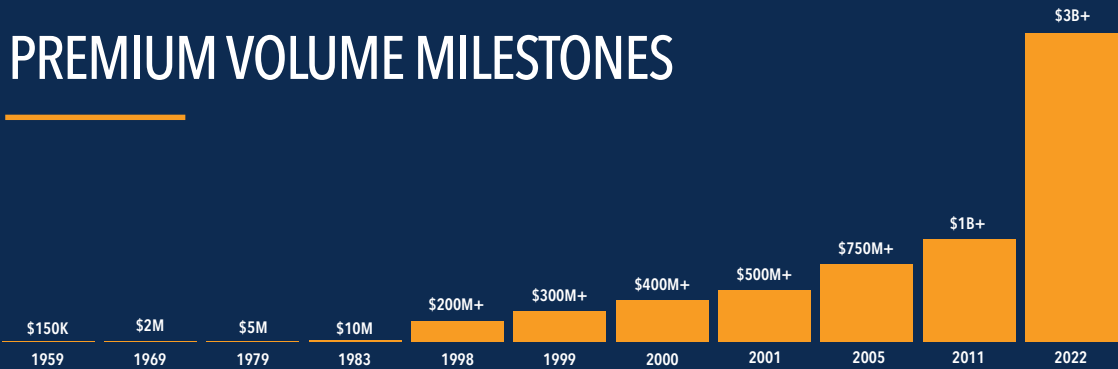
2022

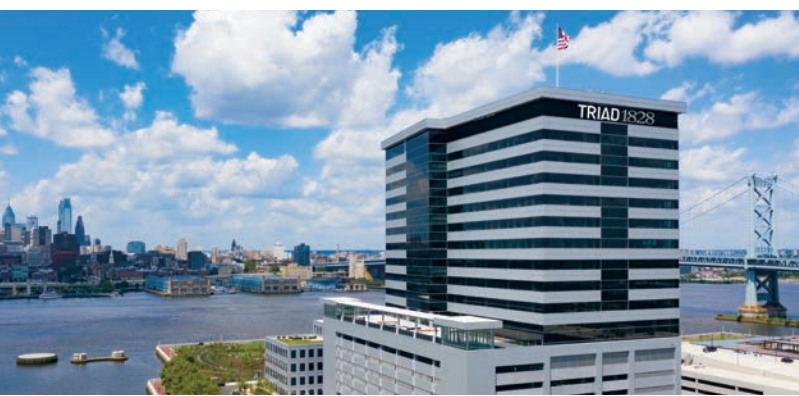
Michael Tiagwad receives the Insurance Society of Philadelphia's 2022 Distinguished Leader Award.



In 1959, Morales & Potter had \$150,000 in premiums. In 2022, just over 60 years later the firm annually exceeds \$3 billion in premiums ▼

PREMIUM VOLUME MILESTONES





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