

Largest Benefits Consulting Firms in the Bay Area

(Ranked by number of Bay Area consultants)

Rank	Prior	Company Address Phone/fax Web site	No. consultants: Bay Area/ Companywide	Staff: Bay Area/ Companywide	Offices: Bay Area/ Companywide	No. consultants: Fee-based/ Commission- based	Sample of services offered	Top Bay Area executive
1	1	Deloitte Consulting LLP 50 Fremont St., San Francisco 94105 (415) 783-5007/(415) 783-4329 www.deloitte.com	215 2,042	1,791 42,000	3 NR	215 0	Talent management; workforce planning & analytics; HR service delivery; health & welfare benefits	Barbara Adachi Principal
2	2	Mercer LLC Four Embarcadero Center, Ste. 400, San Francisco 94111 (415) 743-8700/(415) 743-8950 www.mercer.com	200 7,542	240 18,153	2 209	160 40	Benefits & human capital consulting; HR outsourcing; investment management	Gerry Murphy Market leader
3	3	Watson Wyatt Worldwide 345 California St., Ste. 1400, San Francisco 94104 (415) 733-4100/(415) 733-4199 www.watsonwyatt.com	100 4,500	140 7,000	2 107	100 0	Global employee benefits/compensation; investment consulting; HR administration solutions	Rick Beal Managing consultant
4	18	Towers Perrin 525 Market St., Ste. 2900, San Francisco 94105 (415) 836-1000/(415) 836-1350 www.towers.com	69 3,673	157 6,368	1 96	74 0	Change implementation; health & wellness consulting; reinsurance	Fred Abbott Managing principal
5	6	Buck Consultants LLC 50 Fremont St., 12th Floor, San Francisco 94105 (415) 392-0616/(415) 392-3991 www.buckconsultants.com	62 2,000	66 2,600	1 80	62 1	Retirement, health & welfare & communication consulting; actuarial services	Scott Dunbar Principal
6	5	Compensation Design Group Inc. 160 Spear St., Ste. 230, San Francisco 94105 (415) 618-6000/(415) 618-6097 www.cdgworldwide.com	51 221	57 323	1 3	51 0	Executive compensation consulting; compensation committee governance consulting	Frank Glassner CEO
7	7	Milliman Inc. 650 California St., 17th Floor, San Francisco 94108 (415) 403-1333/(415) 403-1334 www.milliman.com	50 1,100	75 2,100	2 48	50 0	401(k); actuarial; health & welfare	Rich Wright Principal and consulting actuary
8	13	Sitzmann Morris & Lavis Inc. 1 Kaiser Plaza, Ste. 1101, Oakland 94612 (510) 452-0458/(510) 452-1613 www.smlinc.com	46 46	88 90	3 4	0 46	Employee benefits & retirement planning; estate & business insurance planning	Gary Sitzmann CEO
9	10	Woodruff-Sawyer & Co. 220 Bush St., 7th Floor, San Francisco 94104 (415) 391-2141/(415) 989-9923 www.wsandco.com	38 50	235 282	4 6	15 15	Brokerage & consulting support; strategic program design; health-care strategy & administration	Charles Rosson CEO
10	12	Gallagher Benefit Services Inc. 101 Larkspur Landing Circle, Larkspur 94939 (415) 461-8383/(415) 925-2077 www.gallagherbenefits.com	35 NR	51 NR	3 76	35 35	Strategic planning; employee communications; financial management & reporting	Michael Michalski Area president
11	10	Athens Benefits Insurance Services Inc. 2552 Stanwell Drive, Concord 94520 (925) 822-9127/(925) 609-5320 www.jenkinsinsgroup.com	32 40	195 245	3 3	10 32	Employee benefits consulting & brokerage; outsourced benefit administration & HR support; 401(k)	John Connell President
12	8	Aon Consulting 199 Fremont St., 14th Floor, San Francisco 94105 (415) 486-7500/(415) 486-7026 www.aon.com	26 6,300	NR NR	NR 120	NR NR	Health & benefits consulting; human capital consulting; benefits outsourcing	Sandy Asheim San Francisco market leader
12	15	David White & Associates 3150 Crow Canyon Place, Ste. 200, San Ramon 94583 (925) 277-2659/(925) 277-2658 www.dwassociates.com	26 26	15 15	1 1	26 26	Employee benefits; retirement plan services; executive benefit services	David White CEO
14	NL	Willis Insurances Services of California 1 Bush St., San Francisco 94104 (415) 981-0600/(415) 982-7978 www.willis.com	25 1,000	112 16,000	2 70	25 25	Health & welfare consulting & brokering; work-life & wellness consulting; multinational benefits	Joe Tatum Managing partner
15	17	Arlengroup Inc. 101 Montgomery St., Ste. 1750, San Francisco 94104 (415) 733-7000/(415) 956-2115 www.arlengroup.com	19 19	48 48	2 2	19 19	Benefit consulting/brokerage; population health management; benefit administration outsourcing	Roger Arlen CEO
15	14	Hewitt Associates LLC One Embarcadero Center, Ste. 1400, San Francisco 94111 (415) 433-6000/(415) 837-1780 www.hewitt.com	19 2,200	54 23,000	1 93	NR NR	Actuarial; benefits plan design; plan administration	John Bomba Principal
17	18	Keenan & Associates 1111 Broadway, Ste. 2000, Oakland 94607 (510) 986-6750/(510) 986-6756 www.keenan.com	15 54	38 654	2 9	15 15	Benefits administration technology; health & welfare consulting; strategic planning	John Scatterday Senior vice president
17	16	Pen-Cal Inc. 6210 Stoneridge Mall Road, Ste. 300, Pleasanton 94588 (925) 251-3400/(925) 251-3500 www.pencal.com	15 23	49 63	1 5	15 15	Deferred compensation administration; 401(k); payroll administration	Bob Penland Chairman
17	NL	WESPAC 2001 Broadway, 2nd floor, Oakland 94612 (510) 287-5255/(510) 287-5282 www.wespac.net	15 25	50 55	1 4	15 2	Pension consulting; benefit consulting; investment advice	Renee Szu Co-president
20	21	CareCounsel LLC 101 Lucas Valley Road, Ste. 360, San Rafael 94903 (415) 472-2366/(415) 507-1906 www.carecounsel.com	10 10	13 14	1 2	10 0	Health care advocacy services for employees, retirees & family members	Lawrence Gelb CEO
21	21	Benefit Dynamics* 2300 Contra Costa Blvd., Ste. 400, Pleasant Hill 94523 (925) 956-0505/(925) 956-0506 www.pensiondynamics.com	9 9	22 22	1 1	9 0	401(k); cafeteria plans; COBRA	Stephen Butler President
21	8	The Segal Co. 120 Montgomery St., Ste. 500, San Francisco 94104 (415) 263-8200/(415) 263-8290 www.segalco.com	9 620	59 893	1 20	9 0	Health benefits consulting; pension & retirement plan consulting	J. Tim Biddle Senior vice president
23	24	USI Insurance Services 50 California St., Ste. 650, San Francisco 94111 (415) 273-8700/(415) 576-0840 www.usi.biz	7 250	22 55	2 60	0 7	Health & welfare plan consulting & brokerage; retirement plan consulting & brokerage; enrollment benefits	Jeffrey Morgan President, USI North Bay
24	25	JPMorgan Compensation and Benefit Strategies 560 Mission St., San Francisco 94105 (415) 315-5150/(415) 315-5151 www.jpmorgan.com/cbs	5 185	5 205	1 10	5 0	Retirement plans consulting; health & wellness plans consulting; compensation plans consulting	Jon Burg Vice president
24	20	Pollock Financial Group 150 Portola Road, Portola Valley 94028 (650) 529-0500/(650) 529-2131 www.pollockfinancial.com	5 5	25 25	1 1	1 5	Employee & executive benefits; financial planning; 401(k) & 529 plans	James Pollock CEO

This List includes benefit consulting firms located in Alameda, Contra Costa, Marin, San Francisco and San Mateo counties, and the city of Palo Alto.

NR = Not reported. NL = Not listed. ABD Insurance & Financial Services (#4 on last year's list) declined to participate in this year's survey. *A division of Pension Dynamics Corp.

Ranking based on number of Bay Area consultants in 2007.

Researched by Lisa Metzger