

QUARTERLY STATEMENT

AS OF SEPTEMBER 30, 2025

OF THE CONDITION AND AFFAIRS OF THE

BRANCH INSURANCE EXCHANGE

NAIC Group Code.....0000.....0000.....NAIC Company Code.....16825.....Employer's ID Number.....84-4471638.....  
(Current)(Prior)

Organized under the Laws of.....OH.....State of Domicile or Port of Entry.....OH.....

Country of Domicile.....US.....

Incorporated/Organized.....07/23/2020.....Commenced Business.....07/23/2020.....

Statutory Home Office.....20 E. Broad St., Suite 1200.....Columbus, OH, US 43215.....

Main Administrative Office.....20 E. Broad St., Suite 1200.....Columbus, OH, US 43215.....833-427-2624.....  
(Telephone Number)

Mail Address.....P.O. Box 68.....Portsmouth, NH, US 03802.....

Primary Location of Books and  
Records.....20 E. Broad St., Suite 1200.....Columbus, OH, US 43215.....833-427-2624.....  
(Telephone Number)

Internet Website Address.....https://ourbranch.com.....

Statutory Statement Contact.....Susan Colleen Bredemann.....833-427-2624.....  
(Telephone Number)

.....susan.bredemann@ourbranch.com.....  
(E-Mail Address).....(Fax Number)

OFFICERS

Joseph Tierney Masters Emison, President.....Stephen Nicholas Lekas, Chief Executive Officer.....

Joseph Tierney Masters Emison, Secretary.....John Kenneth Wilcox Jr., Chief Financial Officer.....

OTHER

Melanie Rose Irvin, VP, Head of Legal.....

DIRECTORS OR TRUSTEES

Vikas Singhal.....Joseph Tierney Masters Emison.....

Stephen Nicholas Lekas.....Joseph Benjamin Anderson Jr.....

Kyle Austin Beatty.....Teresa Jean Brown#.....

State of Ohio.....

County of Franklin.....SS

The officers of this reporting entity being duly sworn, each depose and say that they are the described officers of said reporting entity, and that on the reporting period stated above, all of the herein described assets were the absolute property of the said reporting entity, free and clear from any liens or claims thereon, except as herein stated, and that this statement, together with related exhibits, schedules and explanations therein contained, annexed or referred to, is a full and true statement of all the assets and liabilities and of the condition and affairs of the said reporting entity as of the reporting period stated above, and of its income and deductions therefrom for the period ended, and have been completed in accordance with the NAIC Annual Statement Instructions and Accounting Practices and Procedures manual except to the extent that: (1) state law may differ; or, (2) that state rules or regulations require differences in reporting not related to accounting practices and procedures, according to the best of their information, knowledge and belief, respectively. Furthermore, the scope of this attestation by the described officers also includes the related corresponding electronic filing with the NAIC, when required, that is an exact copy (except for formatting differences due to electronic filing) of the enclosed statement. The electronic filing may be requested by various regulators in lieu of or in addition to the enclosed statement.

x



Joseph Tierney Masters Emison  
President

x



Joseph Tierney Masters Emison  
Secretary

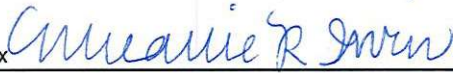
x



John Kenneth Wilcox Jr.  
Chief Financial Officer

Subscribed and sworn to before me

this 11<sup>th</sup> day of November, 2025

x 

a. Is this an original filing? Yes

b. If no:

1. State the amendment number: \_\_\_\_\_

2. Date filed: \_\_\_\_\_

3. Number of pages attached: \_\_\_\_\_

