



# Bo Birtwell, CPCU, CRIS

Vice President, Property and Casualty  
Private Equity and Transaction Advisory  
USI Insurance Services



Bo Birtwell joined USI in 2017 through their acquisition of Wells Fargo Insurance Services. He has served the Philadelphia insurance marketplace for over a decade, creating risk management and insurance strategies for acquisitive, middle market firms. Bo has vast experience providing due diligence services, constructing portfolio insurance programs, and executing ongoing risk management service plans for private equity firms and strategic buyers. More recently, Bo has led the development and implementation of the Representations and Warranties insurance strategy for USI's Philadelphia market.

Prior to joining Wells Fargo, Bo was a senior consultant in the Mergers and Acquisitions unit of a boutique underwriting and consulting firm. While there, budgeted and implemented property and casualty insurance portfolio programs for private equity firms with \$250M to \$5B in assets under management.

Bo started his career as an underwriter with CNA Insurance Company where he was responsible for growing the middle market segment of the Philadelphia branch and the launch of CNA's District of Columbia branch.

Bo is a cum laude graduate of the Fox School of Business and Management at Temple University, where he is currently the chair of the Temple Professional Network. Bo is also active in many local organizations including the Association for Corporate Growth and the Union League of Philadelphia.