

**STATEMENT OF CHANGES IN BENEFICIAL OWNERSHIP**

OMB APPROVAL	
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Check this box if no longer subject to Section 16. Form 4 or Form 5 obligations may continue. See Instruction 1(b).

Filed pursuant to Section 16(a) of the Securities Exchange Act of 1934 or Section 30(h) of the Investment Company Act of 1940

Check this box to indicate that a transaction was made pursuant to a contract, instruction or written plan for the purchase or sale of equity securities of the issuer that is intended to satisfy the affirmative defense conditions of Rule 10b5-1(c). See Instruction 10.

1. Name and Address of Reporting Person* <u>Bunch Richard F. III</u>  (Last) (First) (Middle) C/O TWFG, INC. 10055 GROGANS MILL RD, STE 500  (Street) THE WOODLANDS TX 77380  (City) (State) (Zip)	2. Issuer Name and Ticker or Trading Symbol <u>TWFG, Inc. [ TWFG ]</u>	5. Relationship of Reporting Person(s) to Issuer (Check all applicable) <input checked="" type="checkbox"/> Director <input checked="" type="checkbox"/> 10% Owner <input checked="" type="checkbox"/> Officer (give title below) <input type="checkbox"/> Other (specify below)  President and CEO
	3. Date of Earliest Transaction (Month/Day/Year) 06/05/2026	
	4. If Amendment, Date of Original Filed (Month/Day/Year)	

**Table I - Non-Derivative Securities Acquired, Disposed of, or Beneficially Owned**

1. Title of Security (Instr. 3)	2. Transaction Date (Month/Day/Year)	2A. Deemed Execution Date, if any (Month/Day/Year)	3. Transaction Code (Instr. 8)		4. Securities Acquired (A) or Disposed Of (D) (Instr. 3, 4 and 5)			5. Amount of Securities Beneficially Owned Following Reported Transaction(s) (Instr. 3 and 4)	6. Ownership Form: Direct (D) or Indirect (I) (Instr. 4)	7. Nature of Indirect Beneficial Ownership (Instr. 4)
			Code	V	Amount	(A) or (D)	Price			
Class C Common Stock	06/05/2026		G <sup>(1)(2)</sup>		529,568	D	\$0	33,364,242	I	By LLC
Class C Common Stock	06/05/2026		G <sup>(1)</sup>		264,784	A	\$0	264,784	D	
Class C Common Stock	06/05/2026		G <sup>(2)</sup>		264,784	A	\$0	264,784	I	By wife
Class C Common Stock	06/05/2026		G <sup>(1)</sup>		264,784	D	\$0	0	D	
Class C Common Stock	06/05/2026		G <sup>(2)</sup>		264,784	D	\$0	0	I	By wife
Class C Common Stock	06/05/2026		G <sup>(1)</sup>		264,784	A	\$0	264,784	I	By MCB Trust <sup>(1)</sup>
Class C Common Stock	06/05/2026		G <sup>(2)</sup>		264,784	A	\$0	264,784	I	By RFB Trust <sup>(2)</sup>

**Table II - Derivative Securities Acquired, Disposed of, or Beneficially Owned (e.g., puts, calls, warrants, options, convertible securities)**

1. Title of Derivative Security (Instr. 3)	2. Conversion or Exercise Price of Derivative Security	3. Transaction Date (Month/Day/Year)	3A. Deemed Execution Date, if any (Month/Day/Year)	4. Transaction Code (Instr. 8)		5. Number of Derivative Securities Acquired (A) or Disposed of (D) (Instr. 3, 4 and 5)		6. Date Exercisable and Expiration Date (Month/Day/Year)		7. Title and Amount of Securities Underlying Derivative Security (Instr. 3 and 4)		8. Price of Derivative Security (Instr. 5)	9. Number of derivative Securities Beneficially Owned Following Reported Transaction(s) (Instr. 4)	10. Ownership Form: Direct (D) or Indirect (I) (Instr. 4)	11. Nature of Indirect Beneficial Ownership (Instr. 4)
				Code	V	(A)	(D)	Date Exercisable	Expiration Date	Title	Amount or Number of Shares				
LLC Units in TWFG Holding	(3)	06/05/2026		G <sup>(1)(2)</sup>			529,568	(3)	(3)	Class C Common Stock	529,568	\$0	33,364,242	I	By LLC
LLC Units in TWFG Holding	(3)	06/05/2026		G <sup>(1)</sup>		264,784		(3)	(3)	Class C Common Stock	264,784	\$0	264,784	D	
LLC Units in TWFG Holding	(3)	06/05/2026		G <sup>(2)</sup>		264,784		(3)	(3)	Class C Common Stock	264,784	\$0	264,784	I	By wife
LLC Units in TWFG Holding	(3)	06/05/2026		G <sup>(1)</sup>		264,784		(3)	(3)	Class C Common Stock	264,784	\$0	0	D	
LLC Units in TWFG Holding	(3)	06/05/2026		G <sup>(2)</sup>		264,784		(3)	(3)	Class C Common Stock	264,784	\$0	0	I	By wife
LLC Units in TWFG Holding	(3)	06/05/2026		G <sup>(1)</sup>		264,784		(3)	(3)	Class C Common Stock	264,784	\$0	264,784	I	By MCB Trust <sup>(1)</sup>
LLC Units in TWFG Holding	(3)	06/05/2026		G <sup>(2)</sup>		264,784		(3)	(3)	Class C Common Stock	264,784	\$0	264,784	I	By RFB Trust <sup>(2)</sup>

1. Name and Address of Reporting Person\*  
Bunch Richard F. III  
 (Last) (First) (Middle)  
 C/O TWFG, INC.

10055 GROGANS MILL RD, STE 500

(Street)

THE TX 77380  
WOODLANDS

(City) (State) (Zip)

1. Name and Address of Reporting Person\*

Bunch Family Holdings, LLC

(Last) (First) (Middle)

C/O TWFG, INC.  
10055 GROGANS MILL RD, SUITE 500

(Street)

THE TX 77380  
WOODLANDS

(City) (State) (Zip)

**Explanation of Responses:**

1. On June 5, 2026, Bunch Family Holdings LLC (the "LLC") transferred 264,784 common units of TWFG Holding Company, LLC, together with the corresponding shares of Class C Common Stock of TWFG, Inc., to Richard F. Bunch III. On the same date, Mr. Bunch transferred such common units and corresponding shares to MCB Spousal Lifetime Trust U/T/A 6/19/2025, Michelle C. Bunch, Trustee ("MCB Trust").
2. On June 5, 2026, Bunch Family Holdings LLC transferred 264,784 common units of TWFG Holding Company, LLC, together with the corresponding shares of Class C Common Stock of TWFG, Inc., to Michelle C. Bunch. On the same date, Ms. Bunch transferred such common units and corresponding shares to RFB Spousal Lifetime Trust U/T/A 8/25/2025, Richard F. Bunch III, Trustee ("RFB Trust").
3. Each LLC Unit of TWFG Holding held by the Reporting Person is exchangeable for shares of Class A Common Stock of TWFG, Inc. on a one-for-one basis, and, upon such exchange, an equivalent number of shares of Class C shares of TWFG, Inc. held by the Reporting Person will be cancelled.

**Remarks:**

/s/ Julie E. Benes, as Attorney-  
in-Fact for Richard F. Bunch III 06/09/2026

/s/ Julie E. Benes, as Attorney-  
in-Fact for Bunch Family  
Holdings, LLC 06/09/2026

\*\* Signature of Reporting Person Date

Reminder: Report on a separate line for each class of securities beneficially owned directly or indirectly.

\* If the form is filed by more than one reporting person, see Instruction 4 (b)(v).

\*\* Intentional misstatements or omissions of facts constitute Federal Criminal Violations See 18 U.S.C. 1001 and 15 U.S.C. 78ff(a).

Note: File three copies of this Form, one of which must be manually signed. If space is insufficient, see Instruction 6 for procedure.

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