

Press Kit

Integrity Marketing Group Acquires Plan Advisors



Integrity Further Strengthens Medicare Partner Network with Monumental Acquisition of Plan Advisors

Access to Integrity's exclusive products, tools and resources will expand Plan Advisors' long-term growth

DALLAS - April 27, 2021 - Integrity Marketing Group, LLC ("Integrity"), the nation's largest independent distributor of life and health insurance products, today announced its acquisition of [Plan Advisors](#), a leading independent marketing organization (IMO) with offices in Louisville, Kentucky and Miami, Florida. As part of the acquisition, Plan Advisors Managing Partners Lance Hoeltke and Carlos Rivera will become Managing Partners in Integrity. Financial terms of the transaction were not disclosed.

As one of the country's leading Medicare Advantage distributors, Plan Advisors helps seniors find the right health and retirement solutions through its network of agents throughout the United States. Their leadership team brings a firsthand perspective of agents in the field and combines it with a strong value system, forming the heart of their service-focused organization. This value-centric focus has allowed Plan Advisors to experience multiple years of record growth. In 2021, Plan Advisors will enroll over 100,000 Americans into new Medicare plans.

"Lance and Carlos have deep experience in the industry, serving as agents and as executives with one of the largest and most prestigious health insurance carriers in the country. They have a passion for this market and recognize the need to operate at scale to take their business to the next level," explained Bryan W. Adams, Co-Founder and CEO of Integrity Marketing Group. "Plan Advisors was started by agents and has always put agents' needs first. By joining forces with Integrity, Carlos and Lance can enhance the business they've

built and help it grow in amazing ways. I'm so excited to add Plan Advisors to the Integrity family as we innovate insurance together."

"Integrity has built a runway for success that is unlike anything we've seen in this industry," said Lance Hoeltke, Managing Partner at Plan Advisors. "The Integrity platform lets us provide more of what we've built to an expanding client base at an increasing rate. We innovate and interact like a small company with the horsepower of a large organization behind us. When you are passionate and competitive about what you do, you want to be on the best team. There is no doubt Integrity is the best team for our future."

"After years of intense growth, we came to a crossroads," explained Carlos Rivera, Managing Partner of Plan Advisors. "To maintain the same level of service to our brokers and agency leaders, we needed to scale. The decision to partner with Integrity became clear as we learned how seamless the partnership process is and how well-positioned Integrity is for the future. Integrity offers great outcomes for all of our shared relationships, and we couldn't be happier to join their growing list of leading agency partners."

As the industry continues to undergo a major expansion toward technology enablement, Integrity is providing end-to-end support to its partners. The Integrity platform offers proprietary resources to help Plan Advisors build a stronger digital footprint and to better integrate the technologies agents need to succeed. This includes the exclusive

[MedicareCENTER](#) platform, CRM, quoting and enrollment technology and [industry-leading market research capabilities](#). Integrity also provides partners access to centralized business functions such as IT, accounting, HR, legal and a full-service advertising and marketing agency. Plan Advisors will have access to the leading skill sets of Integrity partners, including [CSG Actuarial](#), [ThomasARTS](#), [Connexion Point](#) and [SeniorCare Benefits](#) call centers, [Access Capital](#), [Brokers International](#) and [Insurance Administrative Solutions](#)’ third-party administrator.

“At the core of our organization is the strong value system that Integrity shares,” continued Hoeltke. “Integrity allows us to maintain our culture while offering unlimited potential to the people we work with every day. We can’t wait to share the future with our team as well as with our fellow brokers and agency leaders around the country.”

The Plan Advisors team will also receive meaningful company ownership through the [Integrity Employee Ownership Plan](#). Riviera shared, “One of the most exciting benefits of this partnership is the Integrity Employee Ownership Plan. The employees who have helped us build this successful business can now benefit from all the added value that Integrity brings to the table.”

“Lance and Carlos share the vision of industry transformation we have at Integrity,” said Steve Young, Chairman of the Board at Integrity. “They value the relationships they have built with agents, agencies and carriers. Now they’re forming their most important relationship yet as an Integrity partner. I can’t wait to see all the benefits they will experience with the best-in-class technology and resources Integrity has to offer.”

For more information about Plan Advisors’ partnership with Integrity, view a video at www.integritymarketing.com/PlanAdvisors.

About Integrity Marketing Group

Integrity Marketing Group, headquartered in Dallas, Texas, is the leading independent distributor of life and health insurance products focused on meeting Americans wherever they are — in person, over the phone and online. Integrity is innovating insurance by developing cutting-edge technology designed to simplify and streamline the healthcare experience for everyone. In addition, Integrity develops exclusive products with insurance carrier partners and markets these products through its distribution network that includes other large insurance agencies throughout the country. Integrity’s almost 5,500 employees work with over 345,000 independent agents who service more than seven million clients annually. In 2021, Integrity expects to help insurance carriers place over \$7 billion in new premium. For more information, visit www.integritymarketing.com.

About Plan Advisors

Plan Advisors, located in South Florida and Kentucky, is a national agency offering Medicare solutions through their national network of independent agents. Plan Advisors provides comprehensive support, industry-leading tools and exclusive resources to the insurance professionals they serve. Their brokers collectively will enroll over 100,000 new clients with their healthcare and retirement decisions in 2021. For more information, visit www.myplanadvisors.com.

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Bryan W. Adams

Co-Founder & CEO



Bryan is the Co-Founder and Chief Executive Officer for Integrity Marketing Group and leads the day-to-day operations of the company. Bryan also serves on the Board of Directors of Integrity.

Bryan is the founder of Legacy Safeguard, LLC a company dedicated with helping members leave a lasting legacy and being remembered long after they're gone. Bryan is considered one of the nation's leading experts in the senior market and speaks frequently across the country about the importance of helping families on one of the most difficult days of their lives. He consults with leading insurance companies to help them offer the best products to this market.

Prior to founding Integrity, Bryan was Vice President of Business Development at Directors Investment Group, Inc., a financial services company that operates several life insurance companies, a registered investment advisory firm, bank holding company and a mutual fund family. Advancing through a series of leadership roles in sales, marketing and product development, Bryan became the youngest Vice President in the company's history, where he oversaw all expansion efforts throughout the United States.

Bryan has a degree in Business Administration from Texas Tech University. Bryan and his family live in Highland Village, Texas.

Lance Hoeltke

Managing Partner



Lance Hoeltke is a Managing Partner of Plan Advisors and a Managing Partner at Integrity Marketing Group.

A seasoned business leader in marketing and sales with a highly successful career in the health insurance industry, Lance has more than 20 years of experience in strategic planning. He served as VP of Medicare Distribution for a leading carrier, overseeing their brokerage, strategic and group Medicare channels.

Lance previously ran his own agency, which has since been integrated into the Plan Advisors organization. Since 2016, he has led Plan Advisors from their Louisville, Kentucky office.

Lance received a Bachelor of Arts in marketing and a Master of Business Administration from the University of South Florida. Lance and his wife, Kisa, reside in Louisville, Kentucky, and have three children — Maya, Milton and Tyson.

Carlos Rivera

Managing Partner



Carlos Rivera is Founder and a Managing Partner of Plan Advisors and a Managing Partner at Integrity Marketing Group. With 18 years of experience in sales, management and strategic leadership for the health insurance industry, Carlos currently leads Plan Advisors out of their Miami, Florida office.

Previously, Carlos served in sales director and sales leader roles for several leading health insurance carriers, specializing in the dynamics of Florida markets, particularly the Medicare and ACA markets in South Florida. Plan Advisors currently provides Medicare distribution for one of Florida's largest medical provider groups.

Carlos received a Bachelor of Arts in environmental science from Rollins College. He and his wife, Sommer, reside in Fort Lauderdale, Florida with their two children, Xavier and Milania.

