

# Press Kit

Integrity Marketing Group Acquisition of McNerney Management Group



## McNerney Management Group and Integrity Marketing Group Partner Together in Monumental Deal

Senior Marketing Specialists, MMG's Brokerage Division, and Senior Benefit Services, MMG's Career Division, are part of a groundbreaking deal that will help serve more Americans with their Life and Health Insurance needs

**DALLAS** (June 18, 2020) Integrity Marketing Group, LLC ("Integrity"), the nation's largest independent distributor of life and health insurance products, today announced it has completed the acquisition of McNerney Management Group (MMG). As part of the acquisition, MMG's four equity owners, Dan McNerney, David McNerney, Bobby Richardson and JoAnn Wray will become owners and partners at Integrity. Financial terms of the deal were not disclosed.

McNerney Management Group, headquartered in Columbia, Missouri, provides life and health insurance to the senior market through two distribution divisions. Senior Marketing Specialists is MMG's independent agent brokerage division supporting about 10,000 agents and is one of the largest Insurance Marketing Organizations (IMOs) in the country. Senior Benefit Services is MMG's career agent group that has set the industry standard for career agency distribution and performance. Combined, the two MMG divisions expect to produce over \$180 million of annualized paid premium in 2020 while serving 82,000 Americans annually. JoAnn Wray, President of Senior Marketing Specialists, and David McNerney, President of Senior Benefit Services, will continue to lead their organizations and become Managing Partners of Integrity. Dan McNerney, Bobby Richardson, JoAnn Wray and David McNerney will all join Integrity's Board of Partners and leadership team.

"The growth and the leadership Integrity has demonstrated is beyond description," said Dan McNerney, founder & retired CEO of MMG. "During these uncertain times, we've realized

that if you're not part of something substantial, it's easy to become outdated. We saw the resources and relationships Integrity offers and knew it was the perfect time to become an Integrity partner. The most important part of our business is serving our clients and we look forward to delivering on that mission as part of the Integrity family."

"The McNerney Management Group team and its divisions are all about treating people well, from their agents, brokers and employees to the seniors they serve nationwide, and they have become one of the market leaders by leading the right way," said Bryan W. Adams, Co-Founder and CEO of Integrity. "Forward-thinking owners like Dan, JoAnn, David and Bobby recognize that an Integrity partnership connects them to prominent industry names while accelerating growth and diversifying their business. We are honored to embark on this partnership as we bring life and health insurance products to even more Americans."

Integrity offers all partners participation in its [Employee Ownership Plan](#), which provides meaningful company ownership to employees. MMG's over 100 employees will be eligible to participate in the Integrity Employee Ownership Plan and be able to access Integrity's other industry-leading benefits. MMG will also have access to Integrity's exceptional platform of resources and infrastructure that help streamline business functions.

"We are now able to offer company ownership to every member of our team, which we never could have done on our own," said JoAnn Wray, President of Senior Marketing

Specialists and Co-Owner at MMG. “We want to keep growing, investing in our people and impacting this industry. We’ve watched the remarkable success of Integrity and we couldn’t be more honored to be a part of this organization.”

“A partnership with Integrity allows us to spend our time where we want to spend it: growing our company,” said David McNerney, President of Senior Benefit Services and Co-Owner of MMG. “We can tap into Integrity’s own advertising agency, ThomasARTS, for digital marketing, agent recruiting and consumer leads help. Extensive IT, HR and compliance resources are at our fingertips through the Integrity shared services that can help drive results for both our agents and our staff.”

“One of the most exciting aspects for McNerney Management Group is openly collaborating with the iconic network of other Integrity partners,” said Bobby Richardson, retired Co-Owner of MMG. “Now we have the chance to put our leaders in front of some of the most experienced minds in the insurance industry. Working with this group will help us take a quantum leap forward in sales and service.”

“The Integrity team continues to grow, bringing together the ‘who’s who’ in the industry,” said Steve Young, Chairman of the Board of Integrity. “McNerney Management Group and its leadership are well-known in the industry and its team shares our focus on serving more Americans and their families while taking care of our team members. We know Dan and his entire team will be a huge asset to the Integrity family.”

“Dan, JoAnn, David and Bobby are some of the best people in the insurance business and have been dear friends of all of us here at Integrity for many years. Being able to now call them partners makes this one of the greatest days of my career,” added Mike White, CEO of AIMC and Managing Partner of Integrity. “There is no telling what we’re going to be able to accomplish together!”

For more information about Integrity’s acquisition of MMG and its divisions, view a video and read the press release at [integritymarketing.com/MMG](https://integritymarketing.com/MMG).

#### [About Integrity Marketing Group](#)

Integrity Marketing Group, headquartered in Dallas, Texas, is the leading independent distributor of life and health insurance products focused on serving Americans. 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 1,000 employees work with over 270,000 independent agents who service over 5 million clients annually. In 2020, Integrity expects to help insurance carriers place almost \$3 billion in new insurance premiums. For more information, visit [integritymarketing.com](https://integritymarketing.com).

#### [About McNerney Management Group](#)

McNerney Management Group provides life and health insurance products to the senior market through two distinct divisions: Senior Marketing Specialists and Senior Benefit Services. Senior Marketing Specialists is an independent agent brokerage assisting and educating agents in all 50 states to help clients make the best insurance decisions. Senior Benefit Services is its career agent group with field offices throughout the country. In 2020, MMG expects to produce over \$180 million of annualized paid premium and serve 82,000 Americans with their life and health insurance needs. McNerney Management Group was founded in 1979 and is headquartered in Columbia, Missouri. For more information, visit [www.gowithmmg.com](https://www.gowithmmg.com).

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# Bryan W. Adams

Co-Founder, CEO

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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.

# Dan McNerney

Partner

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Dan began his insurance career in 1978 working with Summit National Life Insurance Co. Unable to afford a suit, he borrowed one and hit the “real world” as a rookie insurance sales agent. After a few months, he joined The Larry D. Barnes Insurance Agency and specialized in the senior life & health insurance market.

Early in his career, Dan sold insurance door-to-door in rural Missouri. He soon became a regional manager, then state manager, vice president, president, co-owner and finally full owner of the company. In 1995, Dan began to build an Independent Agent division to go along with the existing Career Agent division. Many fantastic people joined the team along the way, and the company grew to exceed \$100 million in annual new sales with over 10,000 agents in all 50 states.

Dan has served on numerous advisory boards, as well as sales and management councils. He is recognized as a leader in the senior health and life insurance market. In 2013, Dan retired from the day-to-day business. He and his wife spend their time between their ranch in northern Colorado and their home in Breckenridge, Colorado, and love being with their children and grandchildren.

## JoAnn Wray

Managing Partner

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JoAnn started her career with the McNerney Management Group immediately after graduating from Truman State University. She worked in various positions alongside Dan McNerney. Together, they started the brokerage division of the company, Senior Marketing Specialists, in 1995.

Since then, Senior Marketing Specialists has grown from two employees and a handful of independent agents to the current staff of almost 100 representing over 10,000 agents nationwide. JoAnn's love of family and service carries through in leading the company and building a great team with an amazing work culture.

JoAnn sits on several advisory boards, including the Inter-Company Marketing Group (ICMG) board. She is actively involved in the charitable foundation they created — “12 Months of Giving” — which supports a variety of local charities such as The Red Cross, Meals on Wheels, Feeding America and more. JoAnn and her husband reside in Columbia, Missouri, and love spending time outside with their children and grandchildren.

# David McNerney

Managing Partner

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David is co-owner of McNerney Management Group and President of Senior Benefit Services. David grew up in the insurance industry, following in his father's and brother's footsteps. He began his career in 1982 as an agent with The Larry D. Barnes Insurance Agency in Trenton, Missouri.

David proved himself as a sales leader before being promoted to a management position in 1985. From there, he helped transform The Larry D. Barnes Insurance Agency into McNerney Management Group, one of the nation's leading providers for senior insurance and Medicare. In 2013, David partnered with JoAnn Wray and Bobby Richardson to become co-owners and co-presidents of McNerney Management Group. The company has continued to grow under their leadership.

David is proud to work with two sons, a daughter-in-law and a nephew who are all part of the McNerney Management Group team. He and his wife reside in Lake of the Ozarks, Missouri, and enjoy spending time with their growing extended family.

# Bobby Richardson

Partner

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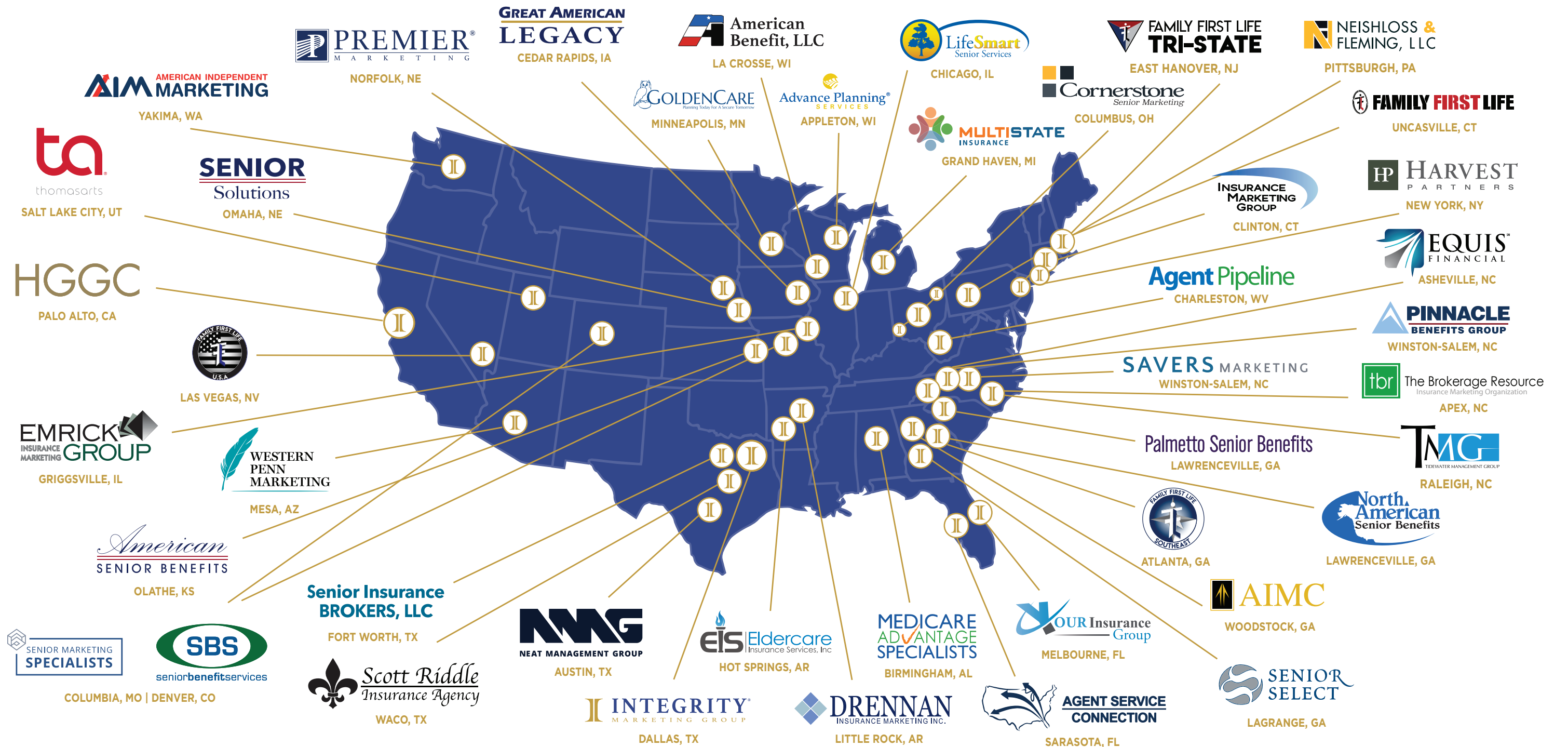


Born and raised in northern Missouri, Bobby began his long and successful career in 1980 with The Larry D. Barnes Insurance Agency, which eventually became McNerney Management Group. He very quickly found a market that allowed him to reach not only his personal goals, but also his goals for his family and career.

Hard work helped Bobby rise up quickly through management levels to his most recent position as Co-President of McNerney Management Group — the holding company for Senior Marketing Specialists and Senior Benefit Services. He has especially enjoyed teaching career-minded individuals to be true professional advisors to senior Americans across the country.

After dedicating 40 years to leading, mentoring and teaching McNerney Management Group agents and staff, as well as countless agents across the country, Bobby has recently retired. He's now enjoying the extra time he has to spend with his family, as well as farming, golfing and traveling.







It's humbling to know we are a part of Integrity.

— David McNerney (Managing Partner)  
*President, Senior Benefit Services*



Anyone we've looked up to, want to be like or partner with are here now in Integrity. We are so thankful.

— David McNerney (Managing Partner)  
*President, Senior Benefit Services*



It's been such an incredible journey, we are so excited to partner and learn with everyone and to be at the same table.

— JoAnn Wray (Managing Partner)  
*President, Senior Marketing Specialists*



It's been 42 years since I started knocking doors, I never imagined we'd end up here.

— Dan McNerney (Partner)  
*Founder/Co-Owner, Retired*



We're so happy and so proud to call ourselves one of the Integrity partners.

— Dan McNerney (Partner)  
*Founder/Co-Owner, Retired*



We will do our part as a partner for Integrity. We've been so blessed to have the success that we've had.

— Dan McNerney (Partner)  
*Founder/Co-Owner, Retired*



We are very excited. What's more exciting to me is that we've received such great comments and we are so excited about being a part of Integrity.

— Bobby Richardson (Partner)  
*Co-Owner, Retired*



No one in the business has been a greater influence on the industry than McNerney Management Group.

— Mike White (Managing Partner)  
*Founder/Principal, AIMC, LLC*



Today is one of the biggest days in the insurance industry.

— Ryan Kimble (Managing Partner)  
*President, Agent Pipeline*



Integrity was never going to be complete until this day.

— Todd Fincher (Managing Partner)  
*President, Tidewater Management Group*