Press Kit

Integrity Marketing Group Acquires Brokers Clearing House





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Legendary Insurance Icon Brokers Clearing House Partners with Integrity to Create Innovative Solutions for Advisors

Industry leader selects Integrity to secure the legacy of its family business and adopt new marketing and technology tools

DALLAS - NOVEMBER 16, 2021 - Integrity Marketing Group, LLC ("Integrity"), one of the leading independent distributors of life, health and wealth products, today announced it has acquired Brokers Clearing House, a leading brokerage general agency (BGA) based in Des Moines, Iowa. As part of the acquisition, Debbie Hannam, President and Partner at Brokers Clearing House, and Dan Allison, Managing Partner at Brokers Clearing House, will become Managing Partners in Integrity. Financial terms of the acquisition were not disclosed.

Bob Hofer launched Brokers Clearing House in 1975 to help individuals with adverse health histories find life insurance policies. His daughter, Barbara Crowley, joined the company in 1977 and as Chief Executive Officer, has overseen Brokers Clearing House's expansion into health insurance, long-term care and financial services. Though the company has grown substantially and received national industry awards, it prides itself on retaining personal relationships with its advisors built on trust and established over decades. Following the acquisition, Debbie Hannam and Dan Allison will assume the company's executive leadership roles, continuing the respected legacy established nearly 50 years ago by Hofer and Crowley.

"The Brokers Clearing House team joins Integrity with an incredible history of high-quality service and incomparable character," shared Bryan W. Adams, CEO and Co-Founder of Integrity Marketing Group. "Barbara embodies all the qualities Integrity values, and the way she has positioned the company for industry leadership is inspiring. Dan's masterful understanding of both client needs and wealth management strategies will strengthen our team. Debbie's knowledge and industry experience instantly make her one of the strongest leaders we have and I'm proud of the expertise she'll bring to the amazing Women in Leadership group at Integrity. It's an honor to partner with Brokers Clearing House and build upon its legacy for the future."

"At Brokers Clearing House, we've always tried to understand the story behind each person we serve, and that mentality has paved the way for our achievements thus far," said Barbara Crowley, CEO of Brokers Clearing House. "To continue to grow, we needed to serve customers even more by providing advisors with the technology and resources we couldn't yet offer them. Partnering with Integrity is the best decision we've ever made. By adding our proud legacy to the Integrity name. I know Debbie and Dan can take Brokers Clearing House to the right place going forward. This is an exciting time to pass the torch, and I'm confident for what lies ahead."

Brokers Clearing House will utilize the full range of Integrity's platform of proprietary resources, including quoting and enrollment tools, CRM, product development, as well as data and analytics. Integrity's business infrastructure of shared services helps already successful companies redirect valuable time to growth strategies. These shared services encompass IT, human resources, legal and compliance, and access to a world-class advertising and marketing agency.

All Integrity partners can also offer their employees meaningful company ownership through the Integrity Employee Ownership Plan.

"Integrity's growth mindset is the same philosophy we operate on," explained Debbie Hannam, President and Partner at Brokers Clearing House. "Integrity's platform ensures we have the resources and technology behind us to grow in the right way, both to honor our legacy and build for a strong future. The unbelievable benefits that Integrity can now provide our staff are one of the most exciting aspects of this partnership. Coming to work has always felt like being with family and I can't wait to be part of a bigger, more creative and even stronger family at Integrity."

Brokers Clearing House brings additional decades of industry leadership to the Integrity partner network. Integrity's fast-growing group of legends and trailblazers collaborate on best practices and strategies to innovate and streamline the insurance process for American consumers.

"Our reputation in the industry is one of exceptional customer service," said Dan Allison, Managing Partner at Brokers Clearing House. "Integrity enables us to maintain that hightouch, boutique feel with our clients, while increasing our capacity and reach. By partnering with Integrity, we become part of a dynamic network of colleagues and mentors to support our growth. Debbie and I have so many goals for the next phase of our careers, and Integrity is the missing link to making them real for our advisors. I have a tremendous amount of gratitude for what we've accomplished thus far and nothing but excitement for the opportunities ahead."

For more information about Brokers Clearing House's partnership with Integrity, view a video at <u>www.integritymarketing.com/BrokersClearingHouse</u>.

About Integrity Marketing Group

Integrity Marketing Group, headquartered in Dallas, Texas, is a leading distributor of life and health insurance and provider of innovative solutions for wealth management and retirement planning. Through its partner network, Integrity helps millions of Americans protect their health, wealth and legacy with a commitment to meet them wherever they are — in person, over the phone and online. Integrity's cutting-edge technology helps streamline the insurance and financial planning experience for all stakeholders. In addition, Integrity develops products with carrier partners and markets them through its distribution network of agencies, brokerages and RIAs throughout the nation. Integrity's almost 5,500 employees work with agents and advisors across the country. For more information, visit <u>www.integritymarketing.com</u>.

About Brokers Clearing House

Brokers Clearing House, Ltd. was founded in 1975 with a focus on helping families get life insurance when other companies couldn't. Because of their business model and focus, they were able to secure billions of dollars of coverage for Americans and their families who otherwise would have none. Over the years, Brokers Clearing House has grown to help thousands of advisors place billions of dollars of coverage every year. Tens of thousands of families across the country have their families protected today because of the hard work and dedication of the impeccable team at BCH.

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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.

Dan Allison Managing Partner



Dan Allison is Managing Partner of Brokers Clearing House and a Managing Partner at Integrity Marketing Group.

For more than 20 years, Dan has consulted some of the most successful financial firms in the world through his work with the company he founded, Feedback Marketing Group. In this role, Dan obtained a unique perspective which helped him grow Brokers Clearing House's business by utilizing the knowledge and wisdom gained from "looking under the hood" of so many other firms.

Dan is a renowned speaker who uses his background in clinical psychology to help clients understand and solve the challenges that so many advisors and Americans have when it comes to managing the risks taken every day.

Debbie Hannam Managing Partner

Debbie Hannam is President and Partner of Brokers Clearing House and a Managing Partner at Integrity Marketing Group.

Debbie began her career with a Des Moines domiciled life insurance carrier working in a sales capacity. With more than 36 years of experience working directly with financial advisors and their clients, her Midwest values and passion for finding the right solutions for clients has never wavered and influences her leadership philosophies.

Along with Debbie's experience in the insurance industry, her professional interests include participation with the local Iowa FPA organization (past president), NAILBA (board member and Charitable Committee), NAIFA (member), Women in Financial Services, National Association of Women Business Owners, Life Brokerage Technology (committee chair), SOTV (member) and DSM Oak Leafs (Board of Directors past president). Additionally, Debbie serves on various insurance carrier advisory boards.

