Press Kit

Integrity Marketing Group Acquires Shields Brokerage





Shields Brokerage Partners with Integrity to Increase Resources for Enhanced Agent Services

Shields Brokerage combines their strong core values with Integrity's expansive insurtech tools to provide expanded unparalleled service and offerings to agents

DALLAS - OCTOBER 12, 2021 - Integrity Marketing Group, LLC ("Integrity"), one of the largest independent distributors of life, health and wealth products, today announced it has acquired <u>Shields Brokerage</u>, a distinguished independent marketing organization ("IMO") based in Exeter, New Hampshire. As part of the acquisition, Chris Shields, President of Shields Brokerage, will become a Managing Partner in Integrity. Financial terms of the transaction were not disclosed.

"We are so excited to welcome Shields Brokerage to the Integrity Family," expressed Bryan W. Adams, Co-Founder and CEO of Integrity Marketing Group. "What Chris and his team have built is truly a brokerage dedicated to serving others. By joining Integrity, we can now provide Shields Brokerage with the technology, tools and resources to elevate their business to even higher levels. Integrity is going to be there to support Shields Brokerage with IT, finance, HR, marketing and more, so Chris and his team can focus on what they do best — helping more Americans."

Shields Brokerage was founded in 1981 by Chris' mother, Joe Anne Shields, who paved the way for the company's success in the senior market. After joining the company in the early '90s, Chris continued to build the agency by focusing on growing strong relationships with their agents and clients. Although Shields Brokerage started as a health and benefits brokerage, it now offers a wider array of products to suit their clients' broad range of insurance needs.

"The partnership with Integrity allows Shields Brokerage to expand and evolve in ways we haven't been able to do on our own," said Chris Shields, President of Shields Brokerage. "Our mantra is 'do right and do good' — and with Integrity, we will now be able to 'do right and do good' on an even larger scale than we could have imagined. The tools that Integrity provides allow us to do our jobs even better and help us fulfill our promise to give our brokers the best service possible. Everything that people know and love about Shields Brokerage will stay the same, but now we can perform at an even higher level."

Shields Brokerage brings over four decades of experience to Integrity. Their industry knowledge and wisdom will be a welcome addition to the impressive team of industry leaders that Integrity has assembled. These platform partners include <u>CSG</u>

<u>Actuarial, ThomasARTS, Deft Research, Access Capital, Brokers International</u> and <u>Insurance Administrative Solutions</u> third-party administrator, as well as call centers <u>Connexion</u>

Point, SeniorCare Benefits and Unified Health.

Shields Brokerage will be able to access the extensive data insights, innovative technology and vast resources Integrity provides to all its partners. The Integrity insurtech platform includes tools such as MedicareCENTER, proprietary quoting and enrollment platforms, data analytics, product development, and research and development. As part of the partnership, Shields Brokerage can now benefit from Integrity's shared services for centralized business services which include IT, accounting, legal, human resources and a full-service marketing and advertising firm.

Shields Brokerage employees are now eligible for meaningful company ownership through the <u>Integrity Employee Ownership Plan</u>.

"One of the best parts about this partnership is the Employee Ownership Plan," continued Shields. "When I think about the future of Shields Brokerage, I want to make sure my employees know they have a place here and a way to provide for their families. Shields Brokerage employees work so hard and up until this point it's always been 'my company,' but with Integrity, I get to share ownership with the people who helped build Shields Brokerage. It's now 'our company' — and I couldn't be more excited to share this with my employees!"

For more information about Shields Brokerage's decision to join Integrity, view a video at http://www.integritymarketing.com/ShieldsBrokerage.

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 and wealth 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 country. Integrity's almost 5,500 employees work with agents and advisors across the country. For more information, visit www.integritymarketing.com.

About Shields Brokerage

Shields Brokerage, headquartered in Exeter, New Hampshire, has worked with hundreds of brokers throughout New England for more than 40 years. The brokers are an integral part of Shields Brokerage. Their professional staff offer insurance products, which include life, Medicare, long-term care, disability, annuities and group benefits. For more information, visit www.shieldsbrokerage.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.

Chris Shields

Managing Partner



Chris Shields is President of Shields Brokerage and a Managing Partner at Integrity Marketing Group.

In 1981, Shields Brokerage was founded in New Hampshire by Chris' mother, Joe Anne Shields. Chris then followed in his mother's footsteps by joining her successful agency in the early '90s.

When the under-65 health market had significant changes in the late '90s, Shields Brokerage pivoted and re-engaged with the brokers as a resource for Medicare supplements, long-term care, annuities and benefit plans. In addition, they added life insurance to the brokerage in 2005.

Shields Brokerage still uses the basic principles that Joe Anne instilled when she founded the agency. The staff goes out of their way to make brokers successful and support them in their sales. By offering multiple lines of business, the team will make every effort to help the Medicare broker who may need a buy/sell for their best client or the life broker who needs to navigate a complicated LTC sale. One call puts them in touch with a team they trust.

Chris and his son, who is an Eagle Scout, volunteer with the Boy Scouts of America and help with several of the committees to support the local Scouting efforts. As a recent PADI-certified diver, Chris enjoys travels above and below the water, seeking new adventures with his family, and loves to explore the beauty of New Hampshire in his Jeep.









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