Press Kit

Integrity Marketing Group Acquires WealthFirm

INTEGRITY®
MARKETING GROUP

September 28, 2021

Integrity Enhances Mission to Protect Health and Wealth of Americans by Partnering with WealthFirm

Synergistic partnership brings WealthFirm's extensive wealth management and retirement planning expertise to Integrity's innovative insurance distribution platform

DALLAS – SEPTEMBER 28, 2021 – Integrity Marketing Group, LLC ("Integrity"), the nation's largest independent distributor of life and health insurance products, today announced it has acquired WealthFirm, a wealth management and retirement planning firm headquartered in Nebraska. As part of the acquisition, Nancy Brozek and Jared Faltys, Co-CEOs of WealthFirm, will become Managing Partners in Integrity. Financial terms of the transaction were not disclosed.

WealthFirm began as a CPA firm in 1948 serving clients in the Midwest. Building on decades of relationships and trust, many clients began turning to their WealthFirm advisors for advice on financial decisions such as wealth management, estate planning and retirement options. In 1997, WealthFirm created Wealth Management LLC, a registered investment advisor ("RIA"), to give their advisors the systems and support to provide clients complete financial well-being solutions. The company then added Retirement Plan Consultants LLC, an advisory resource to help clients create a financially secure retirement in 2008. Today, WealthFirm serves clients through advisors across the United States with almost $3.5 billion in assets under administration across the two entities.

"As Americans age, we believe two of their greatest concerns are their health and their wealth," explained Bryan W. Adams, Co-Founder and CEO of Integrity Marketing Group. "WealthFirm has earned an incredible reputation for being a service-oriented business. By coming alongside them as a partner, Integrity will give them more resources, technology and tools to better serve their advisors and help more Americans. Integrity is committed to innovating for our clients. By adding the wealth management and retirement solution offerings of WealthFirm, we are fulfilling that mission better than ever."

"Americans look to their trusted advisors to help create solutions when making some of life's biggest decisions," said Jared Faltys, Co-CEO of WealthFirm. "By combining our expertise and relationships with Integrity's end-to-end platform, we can help more people feel secure about the future of their finances and healthcare. At WealthFirm, we've always tried to stay ahead of the industry and we immediately recognized that Integrity brings that same commitment to insurance. We've created a synergistic partnership that will help countless more Americans today — and benefit them for generations to come."

Adding WealthFirm's capabilities to Integrity's fast-growing partner network illustrates Integrity's innovation and leadership across every aspect of insurance. Integrity's prestigious network of legends and trailblazers includes companies such as CSG Actuarial, ThomasARTS, Deft Research, Access Capital, Brokers International and Insurance Administrative Solutions' third-party administrator, as well as leading call centers Connexion Point, SeniorCare Benefits and Unified Health.

"The best partnerships benefit everyone, while building something stronger together," said Nancy Brozek, Co-CEO of WealthFirm. "By uniting our companies' strengths, WealthFirm offers Integrity agents the opportunity to dramatically increase their offerings beyond insurance. Our advisors benefit from Integrity's world-class marketing resources and innovative technology available only to partners. Together, we're poised for enormous growth and we're excited to open this new direction together."

WealthFirm will enhance its existing processes by utilizing Integrity's comprehensive technology platform, with resources such as product development, data and analytics, and a leading advertising and marketing firm. The partnership also offers WealthFirm the opportunity to centralize business functions through Integrity's shared services, including IT, human resources, legal, compliance, accounting as well as technology and innovation.

In addition, WealthFirm employees now gain meaningful company ownership through Integrity's Employee Ownership Plan.

"At Integrity, we're all about relationships," shared Steve Young, Board Chairman of Integrity. "This partnership allows us to provide better support to WealthFirm's advisors, while also helping Integrity agents to strengthen the product offerings they can provide clients. Additionally, this partnership will greatly benefit WealthFirm employees. Giving employees meaningful ownership in Integrity through the Employee Ownership Plan shows Integrity's investment in their strongest resource — their people."

For more information about WealthFirm's decision to partner with Integrity, view a video at www.integritymarketing.com/wealthfirm.

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 420,000 independent agents who service more than nine million clients annually. In 2021, Integrity expects to help insurance carriers place over $7 billion in new sales. For more information, visit www.integritymarketing.com.

About WealthFirm

WealthFirm is a family of financial experts headquartered in Norfolk, Nebraska. WealthFirm is the combination of Wealth Management LLC ("WM") and Retirement Plan Consultants LLC ("RPC"). Each brand of the family is dedicated to improving efficiency, simplicity and effectiveness of financial solutions for businesses, individuals and their families. WM partners with professionals nationwide, empowering them to offer financial guidance to their clients. They believe in low cost, full fee disclosure and maintaining global diversification. WM operates as a partner, assisting professionals to become advisors with one-on-one coaching and by assisting with the back-office and compliance issues so they can remain focused on their relationship with their clients. RPC focuses on simplifying the retirement plan experience by offering customized, people-focused plan solutions. They provide back-office services, including access to custodians, reporting and analytics, trade support, asset allocation and rebalancing. RPC currently serves over 1,800 plans and 17,500 participants. The WealthFirm family is devoted to treating everyone they work with like family. For more information, visit www.wealthfirm.info.

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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.

Jared Faltys

Managing Partner

Jared Faltys is a Co-CEO of WealthFirm and a Managing Partner at Integrity Marketing Group.

After graduating from Nebraska Wesleyan University, Jared joined WealthFirm as a CPA in 1994 and has been an investment advisor for over 19 years.

He has earned professional designations in the investment field as a Personal Financial Specialist (PFS), through the American Institute of Certified Public Accountants (AICPA), and as a Certified Plan Fiduciary Advisor (CPFA) which is earned through the National Association of Plan Advisors (NAPA). These designations include a focus on the expertise required of advisors to act as a plan fiduciary or to help plan fiduciaries manage their roles and responsibilities. Jared's areas of expertise include financial planning, wealth management and investment consulting. Jared has also served as a finance subject matter expert and speaker for numerous national conferences.

Jared was born and raised in Northeast Nebraska and over the years has formed many strong bonds within his community. He has a passion for supporting and educating community members of all ages.

When Jared is not busy helping clients, he enjoys spending time with his wife, Julie, and their four children.

Nancy Brozek

Managing Partner

Nancy Brozek is a Co-CEO of WealthFirm and a Managing Partner at Integrity Marketing Group.

After graduating from the University of Nebraska–Lincoln, Nancy joined WealthFirm as a CPA in 1987 and has been an investment advisor for over 19 years. Nancy's dedication to helping her long-term clients achieve financial success has become a standard her clients and coworkers have come to expect.

She has earned her Personal Financial Specialist (PFS) designation through the American Institute of Certified Public Accountants (AICPA), which relates to various topics such as financial planning for organizations, investment management and risk analysis. Nancy's areas of expertise include financial planning and business consulting, as well as tax planning and preparation.

When Nancy is not in the office, she enjoys spending time with her husband, Kelven, and their three children and four grandchildren.


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