

Press Kit

Integrity Marketing Group Acquires Statz Agency



July 6, 2022



Integrity Extends Medicare Distribution in Southwest with Statz Agency Partnership

Arizona IMO's commitment to service and education combined with Integrity's innovative platform for growth will empower and benefit agents and senior consumers

DALLAS - JULY 6, 2022 - Integrity Marketing Group, LLC ("Integrity"), a leading distributor of life and health insurance, and provider of wealth management and retirement planning solutions, today announced it has acquired [Statz Agency](#), an independent marketing organization ("IMO") based in Phoenix, Arizona. As part of the acquisition, Suzanne Tatz, Founder and CEO of Statz Agency, will become a Managing Partner in Integrity. Financial terms of the acquisition were not disclosed.

With a strong passion for serving seniors, Statz Agency is committed to helping agents make life and health insurance recommendations that are most beneficial to their clients. Suzanne Tatz has taken a highly strategic approach to building the agency over the past ten years, achieving many growth milestones along the way by providing solutions coupled with knowledge and dedication. Statz Agency has also made a significant impact in communities by providing Medicare education that empowers seniors to make informed decisions for protecting their health and wealth.

"Suzanne Tatz is a dedicated, hard-working and humble leader who will do whatever it takes to ensure that Statz' agents can accomplish their goals," shared Bryan W. Adams, Co-Founder and CEO of Integrity. "Integrity offers Statz Agency the perfect combination of relationships, technology and proven support that will help them soar to new heights. By accessing Integrity's groundbreaking resources and systems, we'll see Statz Agency experience the 'Integrity Effect' of amplified growth and success. Through steady innovation, Integrity is setting the pace for the future of insurance. I'm grateful that

Suzanne and her team have joined us in our mission to optimize the experience for all stakeholders and help more Americans enjoy the safe and comfortable retirement they want and deserve."

Statz Agency can deepen its impact, increase efficiencies and expand growth opportunities by leveraging Integrity's extensive infrastructure of business services. These functions encompass areas such as Technology & Innovation, People & Culture, legal and compliance, and access to an industry-leading advertising and marketing firm. Additionally, the Integrity omnichannel platform is designed to help companies like Statz Agency boost productivity and achieve its full potential. The platform's powerful end-to-end offerings include category-specific customer relationship management software, broad and insightful data and analytics, and continuous product development.

Additionally, Statz Agency gains the ability to offer its employees meaningful company ownership through the [Integrity Employee Ownership Plan](#).

"At Statz Agency, our goal is to connect seniors with solutions that fit their needs while providing excellent service," explained Suzanne Tatz, Founder and CEO of Statz Agency. "Our relationships with clients extend beyond just a sale and we love that Integrity operates under the same philosophy. I feel like I'm joining a larger family that holds the same core values that Statz Agency was built on — it's truly a partnership where everyone wins. Our agents can now access Integrity's technology-driven solutions to move us forward to

our next level of growth while our team members and I can excel in the roles we love — networking and building agencies. In addition, Integrity’s Employee Ownership Plan gives our employees the chance to be part of a larger future than we could have provided to them on our own. With Integrity by our side, our growth potential has no end in sight and I’m personally thrilled to be a part of this extraordinary team.”

Suzanne Tatz will join like-minded leaders in the Integrity partner network, where teamwork is fueling innovation that optimizes life, health and wealth solutions for consumers. Comprised of industry legends and icons, these leaders are defining best practices and strategies that improve insurance and financial services processes across the board. Through collaboration, Integrity partners are helping more Americans prepare for the good days ahead.

For more information about Statz Agency’s decision to partner with Integrity, view a video at www.integritymarketing.com/Statz.

About Integrity Marketing Group

Integrity, 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 life, 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 nation. Integrity’s nearly 6,000 employees work with more than 450,000 agents and advisors who serve over 10 million clients annually. In 2022, Integrity will help carriers place more than \$12 billion in new sales and oversee more than \$20 billion of assets under management and advisement through its RIA and broker-dealer platforms. For more information, visit www.integritymarketing.com.

About Statz Agency

Headquartered in Phoenix, Arizona, Statz Agency was founded by Suzanne Tatz to provide greater consultative guidance to agents. The agency primarily focuses on helping seniors understand their Medicare options and get the coverage they need. With a mission to educate and assist, the Statz team empowers clients to make informed decisions on how to protect their health, wealth and future. With a commitment to providing quality solutions with honesty and integrity, Statz agents help the seniors they serve prepare for the future with confidence.

Media Contact:

Rachel Aird, Public Relations Director
Integrity Marketing Group
press@integritymarketing.com
801-706-7005

Partnership Inquiries:

Eric Pederson, Vice President of Business Development
Integrity Marketing Group
partnership@integritymarketing.com
866-650-1857

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.

Suzanne Tatz

Managing Partner



Suzanne Tatz is the Founder and CEO of Statz Agency and a Managing Partner at Integrity.

Suzanne grew up in West Des Moines, Iowa, but has lived in Phoenix, Arizona, since 1998. She began her career in marketing and advertising. However, she came to discover a passion for changing people's lives through the insurance industry.

In 2012, Suzanne founded Statz Agency to provide greater consultative guidance to agents with a focus on helping seniors get the coverage they need. Today, Statz Agency serves as one of the leading agencies for the senior market in the Southwest.

When she is not working, Suzanne can be found boating on a lake or relaxing by a pool or beach. She has a deep love for dogs and enjoys spending time with her dogs, Token and Jack.

