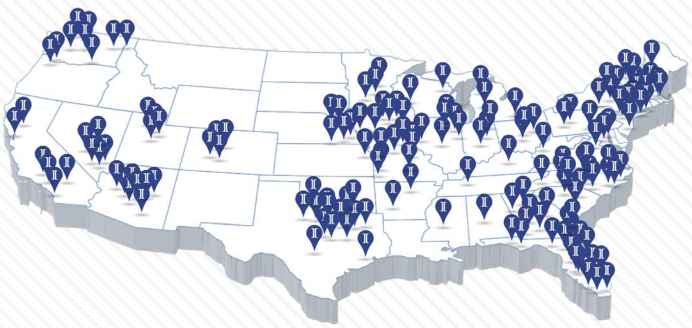
Integrity Wealth at a Glance

INTEGRITY WEALTH

Integrity Wealth is a leading provider of wealth services[1] across multiple channels, including independent advisors, W2, independent RIAs and insurance-based wealth advisors. Our powerful network enables us to offer holistic guidance so you can deliver comprehensive financial support to your clients. Our open architecture platform provides flexibility and choice in custodians, products, technology and more, allowing you to serve clients with various needs. From financial planning and asset management to estate and retirement planning, we can help your clients make the most of what life brings — and help grow your business.

Coast-to-Coast Footprint

Our reach and scale helps us deliver a full spectrum of insights, products, solutions and guidance to Americans across the country.



250+ Integrity partners

250+ Offices nationwide

5,000 Full-time employees

750+ Carrier & custodian relationships

The Power of Integrity Wealth[2]

Founded in 2006, Integrity currently serves over 14 million Americans with a mixture of their life, health and wealth needs.

$55 billion
Assets under management

$31+ billion
Annual new sales premium across Health, Life and Wealth channels

600,000
Agents, advisors and associates

Respected Industry Leader

We're committed to creating a better experience for all stakeholders across our Wealth, Health and Life channels.

Newsweek America's Greatest Workplaces for Parents & Families 2025[3]

American Business Awards Gold Stevie Award for Company of the Year 2023[4]

Inc.'s 2023 & 2024 Power Partner Honoree[5]

Best CEO 2024[6]

BARRON'S Gladstone — 2022 Top 100 RIA Firms[7]

[1] *Investment advisory, brokerage and financial services are provided by Integrity Wealth LLC's affiliates that are properly registered with the SEC and/or FINRA, including Integrity Alliance, LLC, Integrity Advisory Solutions, LLC, Gladstone Institutional Advisory, LLC, Wealth Management of Nebraska, LLC, and Integrity Capital, LLC. Integrity Wealth itself is not a registered broker-dealer or investment adviser.*

[2] *Integrity Wealth, LLC is a subsidiary of Integrity Marketing Group, LLC and these numbers reflect both a combination of insurance-focused entity and wealth entity numbers. Company stats provided as of November 2025.*

[3,4,6,7] *Awards given to Integrity Marketing Group, LLC*

[5] *www.barrons.com/advisor/report/top-financial-advisors/ria*

Comprehensive Services That Fit the Way You Work

Proven Growth Platform

We invest in technology, data and resources that empower advisors and financial professionals across our open architecture platform.

- Integrated technology platforms
- Integrated solutions for managing real-time orders, workflow and reporting
- Extensive research expertise
- Practice management and business development

Integrity Wealth's broad support is enabled through our subsidiaries and extends across multiple channels, including independent advisors, W2, independent RIAs and insurance-based wealth advisors. This allows us flexibility to feature a wide and diverse range of wealth capabilities through our network:

- **Integrity Alliance:** Broker-Dealer/Corporate RIA
- **Integrity Financial:** Hybrid RIA
- **Integrity Advisory Solutions:** Fee-Only RIA

Our omnichannel platform delivers comprehensive wealth management services, financial solutions and support.

Comprehensive Wealth Management Services & Financial Strategies

- Financial Planning
- Asset Management and Allocation
- Investment Strategy

Full Technology Suite

- Client Relationship Management
- Risk Assessment
- Reporting

Front Office Support

- Business Planning & Development
- Advisor Recruiting
- Lead Generation & Marketing

Cross-Platform Opportunities

- Life & Heath Cross-Selling Training & Guidance
- Access to Full-Service Life & Health Insurance Platform

Strong Custodial Relationships and Industry Partners

The expansive product offerings and custodial relationships our partners provide allow you to choose what best suits your client's needs, so you don't have to compromise your goals.

LPL Financial

BNY | PERSHING

Fidelity

SS&C

Charles Schwab & Co, Inc.

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