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J. Berg & Associates Partners with Integrity to Ignite New Era of Growth

February 23, 2021

DALLAS – February 23, 2021 – Integrity Marketing Group, LLC ("Integrity"), the nation's largest independent distributor of life and health insurance products, today announced it has acquired <u>J. Berg & Associates</u>, a leading insurance marketing organization ("IMO") based in St. Louis, Missouri. As part of the acquisition, <u>Bob Berg</u>, President of J. Berg & Associates, and <u>Keith Berg</u>, Vice President of J. Berg & Associates, will become Managing Partners with Integrity. Financial terms of the transaction were not disclosed.

- "J. Berg & Associates is a multi-generational family company with an eye towards the future, which is why they decided to join Integrity's fast-growing partnership as we innovate insurance together," said Bryan W. Adams, Co-Founder and CEO of Integrity Marketing Group. "You won't find leaders more committed to taking care of those around them than Bob and Keith; it's the guiding principle that has helped them build such a strong reputation. As they position themselves for future growth, we're committed to build on their success through the powerful technology and service solutions available on the Integrity platform. We can't wait to see J. Berg & Associates experience the 'Integrity Effect' of supercharged growth and expansion."
- J. Berg & Associates was founded in 1952 by Missouri native Jerry Berg, who was deeply committed to ensuring the success of his agents. The agency specializes in providing insurance coverage to the senior market, including Medicare, long-term care, home health care, hospital indemnity and life insurance products. Today, the company is one of the nation's most respected senior-focused IMOs. In 2020, J. Berg & Associates helped serve more than 20,000 American seniors with their life and health insurance needs.

"It's incredible to now be aligned with Integrity, the largest provider of life and health insurance protection in the United States," shared Bob Berg, President of J. Berg & Associates. "Integrity's commitment to excellence ensures we are now on the cutting edge of the industry as we innovate it, and now we will be able to provide our agents resources which are second to none. Our agents look at all avenues to provide well-rounded coverage for each customer and the most advanced technology and partner support can only be found through the Integrity platform. Because of this partnership, we're more excited about our future than ever before."

J. Berg & Associates' team of agents will now utilize Integrity's platform of proprietary technology, which includes CRM, quoting and enrollment tools, research and development, data solutions, product development and call center capabilities. The agency can streamline operations by employing Integrity's support functions, such as accounting, compliance, legal, human resources and a full-service advertising and marketing firm. In addition, Integrity's roster of partners is made up of industry trailblazers and icons who provide a wealth of knowledge and best practices J. Berg & Associates can now tap into.

A further benefit to employees is access to Integrity's Employee Ownership Plan, which offers meaningful company ownership.

"Taking care of our agents and employees has always been the hallmark of our company and this partnership benefits them in so many ways," said Keith Berg, Vice President of J. Berg & Associates. "Partnering with Integrity gives our agents endless possibilities through transformative technology and tools we haven't had access to before. Our employees have always been like family to us, so to now offer them company ownership is a long-awaited benefit. This partnership feels like a new beginning for us and the future looks better than ever."

"Our father founded our company almost 70 years ago, and he would be absolutely thrilled we aligned ourselves with such a prestigious company as Integrity Marketing Group," added Bob Berg. "He'd be so proud of the legacy we've continued and now this next chapter in our growth."

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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 5,000 employees work with over 325,000 independent agents who service more than seven million clients annually. In 2021, Integrity expects to help insurance carriers place over \$3.5 billion in new premium.

About J. Berg & Associates

Established in 1952, J. Berg & Associates is headquartered in St. Louis, Missouri. With almost 70 years of experience, they have remained one of the leading agencies for serving seniors in the Midwest. J. Berg & Associates specializes in senior health and life insurance, providing Medicare Supplement and Medicare Advantage plans, long-term and short-term nursing home and home health care insurance, hospital indemnities, dental, vision and hearing policies, as well as annuities, guaranteed issue and simplified issue life insurance. Their representatives work with the highest-rated carriers, helping them serve over 20,000 seniors annually. For more information, please visit www.jbergassociates.com.

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