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Alera Group Bolsters Wealth Management Practice with the Acquisition of Sitzmann Morris & Boyle Insurance Agency

JULY 30, 2021



Alera Group, a top independent, national insurance and wealth management firm, today announced the acquisition of Sitzmann Morris & Boyle (SMB) Insurance Agency, a California-based financial services agency providing wealth-preserving strategies and life insurance products and services nationwide.

"Throughout our six decades in business, SMB has been serving affluent, multi-generational families with comprehensive financial planning services in which the legal, tax, investment and insurance aspects complement and enhance each other. We

take a holistic and strategic view of the wealth planning process that includes risk management as a cornerstone for protecting and promoting our client's financial futures. Our collaborative approach results in a well-integrated team and a seamless financial plan that exudes sustainable confidence. Joining Alera Group will allow us to expand our offering and provide a greater array of resources for our clients," said Donald Morris, President of Sitzmann Morris & Boyle Insurance Agency.

Sitzmann Morris & Boyle (SMB) Insurance Agency is an industry leader in designing sophisticated life insurance programs, administering client policies, and monitoring ongoing product performance. The firm is a member of the M Financial Group, which is a unique nationwide network of select independent insurance & investment firms dedicated exclusively to serving wealthy individuals, successful corporations and their executives. The combined benefit of SMB and M Financial provides innovative and proprietary solutions tailored to meet each client's financial and wealth preservation needs.

"Sitzmann Morris & Boyle Insurance Agency understands every client deserves a financial planning model supported by multiple perspectives," said Alan Levitz, CEO of Alera Group. "Their emphasis on collaboration and communication are in line with our core values here at Alera Group. We're excited to offer their industry-leading life insurance structures to our clients."

"The addition of the Sitzmann Morris & Boyle team is an important part of our plan to expand the breadth, depth and geographic reach of Alera Wealth Management," added Tina Hohman, executive vice president of Alera Group and practice leader of Alera Wealth Management.

The Sitzmann Morris & Boyle Insurance Agency will continue serving clients in their existing roles. Terms of the transaction were not announced.

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About Alera Group