

Transformative Partnership with Aegis Financial Brings Additional Life and Annuity Expertise to the Integrity Platform

Addition of Denver-based brokerage enhances Integrity's mission to protect the health and wealth of consumers while giving Aegis Financial access to best-in-class resources



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Integrity Marketing Group, LLC →

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DALLAS, Sept. 14, 2021 /PRNewswire/ -- Integrity Marketing Group, LLC ("Integrity"), the nation's largest independent distributor of life and health insurance products, today announced it has acquired Aegis Financial, a leading financial marketing organization based in Denver, Colorado. As part of the acquisition, Darin W. Lucas, President of Aegis Financial, and Carl Muehlemeyer, Chief Operations Officer of Aegis Financial, will become Managing Partners in Integrity. Financial terms of the transaction were not disclosed.



Transformative partnership with Aegis Financial brings additional life and annuity expertise to the Integrity platform.



"Integrity has the honor of partnering with some of the biggest names in the life and health insurance business and today we're thrilled to add Aegis Financial, a leader in wealth planning, to our expert platform," said Bryan W. Adams, Co-Founder and CEO of Integrity Marketing Group. "Darin and Carl have built a thriving business upon a strong, values-based foundation and unyielding commitment to excellence. As part of the Integrity family, we'll provide them with the world-class support to help them grow even faster, through marketing resources, technology and a wide range of supportive services. Together, we'll transcend into new markets and find new ways to better serve the health, wealth and retirement needs of even more Americans."

Aegis Financial is a well-known and respected name in the annuity and wealth planning market, having experienced steady growth every year of its nearly three decades in business. The company offers highly personalized services for financial advisors and insurance professionals, who support their customers with annuity, life insurance, retirement and business solutions. Emphasizing more attention to a select group of advisors, Aegis Financial focuses on the individual success of each agent by offering products and services designed to fit the needs of advisors and the clients they serve. Today, the company supports a close-knit team of agents nationwide who write \$1 billion of annuities annually.

"The concept of Aegis Financial is pretty simple," said Darin W. Lucas, President of Aegis Financial. "It's built on relationships. Integrity has the best resources in the industry, which will help our team of advisors work more efficiently and focus on what matters most – building those relationships with their clients. Having access to Integrity's partners and technology is an absolute game changer for us and we're ecstatic to become part of the Integrity platform. It's a great day for Aegis Financial and we cannot wait to experience the 'Integrity Effect' of record growth for ourselves as we work to help our advisors meet the retirement needs of even more Americans."

Integrity is shaping the future of the insurance and financial services industries through groundbreaking cross-industry collaboration within its rapidly expanding partner network. Aegis Financial will have access to the leading skill sets of partners 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.



"When you focus on caring for people's needs, incredible things can happen – we're living proof of that," said Carl Muehlemeyer, Chief Operations Officer of Aegis Financial. "We do everything we can to give our agents the support they need to be successful. Now that we are partnering with such an innovative industry leader, we can offer our clients a level of resources that are second to none. With Integrity, we are stronger and can grow faster than ever before. This partnership greatly enhances our ability to help Americans reach their retirement goals. Our opportunity together is incredible and I'm excited to get after it."


Integrity's leading insurtech platforms and end-to-end resources will help Aegis Financial's advisors diversify their product offerings and provide clients with a broader range of solutions. The platform includes tools such as proprietary quoting and enrollment platforms, product development, data analytics, and research and development. Aegis Financial is eligible to engage the extensive shared services available to Integrity partners, including IT, accounting, legal, human resources and a full-service marketing and advertising firm.

Aegis Financial can also offer employees meaningful company ownership through the Integrity Employee Ownership Plan.

"Partnering with Integrity allows us to scale at a capacity we never could have on our own – the Employee Ownership Plan is another great example of that," continued Lucas. "As a family company, taking care of our work family is central to everything we do. The opportunity to provide our employees with ownership in a company the size of Integrity is unheard of in this industry, and we're thrilled to now offer that!"

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

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 Aegis Financial

Aegis Financial, headquartered in Denver, Colorado, is one of the premier financial marketing organizations in the country, providing annuity, life insurance, retirement and business solutions to independent insurance professionals, financial advisors and their clients. For nearly 30 years, Aegis Financial has focused on providing a small-business experience and culture that puts the client at the center of everything they do, coupled with extensive, high-level resources that give their clients the best of both worlds. Aegis Financial's elite team proudly serve nearly 3,000 Americans and nurture relationships with more than 600 writing agents and advisors who produce \$1 billion in paid premium annually. For more information, visit www.aegisfinancial.com.

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