

PRESS RELEASE

Lockton Affinity, LLC Acquires SBG, Inc. Insurance Services

Press Release

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Lockton Affinity is expanding its program offering and capabilities to Registered Investment Advisors (RIAs), financial advisors and other professionals through the acquisition.

Overland Park, KS—Lockton Affinity, one of the nation's leading program administrators, has acquired SBG, Inc. to provide an expanded client service offering in wholesale distribution of annuities, life insurance, long-term care and disability insurance.

The acquisition of SBG complements Lockton Affinity's existing business, The BluePrint Insurance Services, and is part of a larger strategic vision to fully support RIAs, financial advisors and other financial professionals.

"Bringing SBG into Lockton Affinity is a perfect match of strategic and cultural fit," notes Patrick O'Farrell, President of Lockton Affinity. "SBG's founder, Bill Dolan, has built an impressive business that augments our ability to compete in the RIA and wealth advisory industry. SBG adds capabilities in personnel and infrastructure that will help us deliver further meaningful growth and better serve the comprehensive needs of financial advisors and their businesses."

According to O'Farrell, "SBG feels and operates like a family. Despite Lockton Affinity's size and ongoing growth, we pride ourselves in maintaining our own family-like culture. It was clear as we negotiated this acquisition that our two businesses have that same ideological foundation."

Lockton Affinity Senior Vice President and co-founder of The BluePrint, Matt Meyer, expects the acquisition will support Lockton Affinity's efforts to provide RIAs and wealth advisors with a comprehensive client experience, with SBG remaining an AIMCOR/EIG member: "The advice landscape is changing. Clients want one point of contact for all of their financial needs, including insurance. Lockton Affinity moved to acquire The BluePrint, and now SBG, to help it do just that."

Meyer continues, "The SBG team has built an excellent long-term reputation in the

industry. I've known Bill Dolan personally for some time and it's an honor to help transition Bill's business into Lockton Affinity. I'm excited to integrate our teams and see what we can build together."

SBG President and Partner, Bill Dolan, believes the partnership will be extremely beneficial for Lockton Affinity, SBG and their clients: "I'm incredibly proud of what we have built at SBG over the last 26 years. We established a successful business while maintaining an excellent family culture. While I will continue with the firm as a strategic advisor, I couldn't be more pleased to have Matt, backed by Lockton Affinity, take the lead on the strategic direction of the business. Combining The BluePrint and SBG under the Lockton Affinity umbrella will uniquely position us to be a leader in our space for years to come."

Interested parties can learn more by contacting Patrick O'Farrell at Lockton Affinity at (913) 652-7500 or Info@LocktonAffinity.com.

About Lockton Affinity, LLC: Lockton Affinity, an affiliate of Lockton Companies, was formed in 1987 to meet the dynamic, specialized insurance needs of affinity groups, non-profits, associations and franchises. Today, Lockton Affinity is one of the nation's leading program administrators, serving a wide array of industries ranging from small business, financial institutions and franchise businesses to fraternal organizations and common-cause groups.

About SBC, Inc.: SBG creates custom solutions for its insurance industry clients, developing a true partnership beyond transactional service, and uses innovative tools to jumpstart productivity for greater business growth. The SBG guarantee is to deepen client relationships, diversify their clients' practice and deliver meaningful solutions.

SBG Insurance Services are administered by Lockton Affinity, LLC d/b/a Lockton Affinity Insurance Brokers LLC in California #0795478. Coverage is subject to actual policy terms and conditions. Policy benefits are the sole responsibility of the issuing insurance company.

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