

Ash Brokerage Joins Integrity in Historic Partnership to Further Innovate Insurance and Financial Services



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Integrity Marketing Group, LLC →

May 04, 2022, 10:30 ET

Transformational union of industry trailblazers will empower agents and advisors to provide more holistic life, health and wealth solutions that help Americans plan for the good days ahead

DALLAS, May 4, 2022 /PRNewswire/ -- Integrity Marketing Group, LLC ("Integrity"), a leading distributor of life and health insurance, and provider of wealth management and retirement planning solutions, today announced it has entered into an agreement to acquire Ash Brokerage, a leading financial advisory and general agency brokerage. As part of the acquisition, Tim Ash, CEO of Ash Brokerage, will become a Managing Partner in Integrity. Financial terms of the acquisition were not disclosed and the transaction is scheduled to close upon regulatory approval.



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Industry pioneer Jim Ash launched Ash Brokerage more than 50 years ago by providing health insurance to groups and individuals in the Fort Wayne, Indiana, area. Through thoughtful acquisitions and a well-executed growth strategy, the brokerage expanded to include life insurance, long-term care, disability, annuities and retirement solutions. In 1997, Jim transitioned executive leadership to his son, Tim Ash, who has expertly guided the firm to further national prominence while maintaining a consistent focus on building strong relationships with agents and advisors and delivering world-class service.

Today, Ash Brokerage is one of the largest insurance brokerages in the United States, with more than 400 employees nationwide. In 2021, Ash Brokerage helped to place over \$2 billion of premium, while underwriting \$25 billion of face amount to protect American families and businesses. They also provide superior consultative, outcome-based insurance solutions to registered investment advisors. Throughout its history, Ash Brokerage has impacted almost one million lives with its products and services. In addition, the Ash family and organization have become known and respected for broad, ongoing philanthropic giving and investment efforts in their community of Fort Wayne.

"It is rare to find an organization with a 50-year track record of sustained excellence," said Bryan W. Adams, Co-Founder and CEO of Integrity. "Ash Brokerage is a company that has continually focused on innovation – Tim, Jim and their committed team have always been conscientiously moving forward to maximize their impact on the people they serve and the place they call home. Ash Brokerage has created a strong culture of family and community, resulting in time-honored client relationships and impressive employee retention. This partnership is consistent with Integrity's continued focus on transforming the industry to better serve Americans with their life, health and wealth planning needs. By combining the systems, strengths and expertise of our two organizations, Integrity and Ash Brokerage will have an even greater



impact on the lives of the agents, advisors, carriers and consumers we collectively serve. We couldn't be more honored to welcome Ash Brokerage to the Integrity family, and we look forward to an exciting future as we work to innovate the industry together."

"We are in the business of impacting lives, and service is our calling card," said Tim Ash, CEO of Ash Brokerage. "We honor the relationships we enjoy with the thousands of financial advisors we serve and the clients who depend on them, as well as our family of teammates. Everyone at Ash Brokerage is incredibly passionate about safeguarding the financial freedom and security of American families. It's why we're so committed to developing products and strategies that empower our advisors to provide their clients with the best solutions for every situation. By partnering with Integrity, Ash Brokerage will have access to a more diversified mix of life, health and wealth solutions, enabling our advisors to design and deliver more holistic offerings for their clients. The breadth and depth of Integrity's data and technology perfectly complements our own extensive systems and services, which allows our team to compete at an even higher level. We've chosen to unite so we could have a greater impact on the lives of the people and communities we serve. That shared commitment is the heart of this partnership, and we are thrilled about the opportunities ahead of us for the next 50 years and more."

As an esteemed and well-respected insurance name, Ash Brokerage will bring additional strength and leadership to Integrity's fast-growing partner network. This trailblazing, collaborative group of industry leaders and icons is unified by a common vision to innovate insurance and optimize processes that protect the life, health and wealth of all Americans. Adding Ash Brokerage's deep expertise and proprietary technology, products and resources to the platform will greatly enhance the ability of Integrity partners to impact lives for the better. Ash Brokerage's proven systems for assisting large institutions with their insurance offerings will also serve as a model for all Integrity partners.

The Integrity platform is comprised of world-class insurtech offerings and innovative systems designed to help partners unlock their full potential. Strategic partnerships include marketing through nationally-renowned ThomasARTS, comprehensive quoting and enrollment systems through CSG Actuarial, ongoing product development through AIMC, third-party administration services through IAS, data and analytics through DEFT Research and lead generation capabilities through Mail Pro Leads.

Ash Brokerage can leverage this end-to-end suite of resources to further enhance its already exceptional organization and approach, while utilizing the many administrative business functions provided by Integrity. Industry-leading shared services offered to all partners include areas such as People & Culture, Technology & Innovation, finance, legal and compliance.


Additionally, Ash Brokerage will now offer its employees meaningful company ownership through Integrity's Employee Ownership Plan.

"For over 50 years, Ash Brokerage has provided our customers with unparalleled support to help them feel secure in their future," explained Jim Ash, Founder of Ash Brokerage. "Our heritage is well matched by Integrity's forward-thinking leadership and strong core values, which align so closely with our own. In addition, we're proud and honored to join Integrity's partner network, where we've seen wonderful collaboration among industry legends who are driven to make our industry better. Working together will help all of us gain critical insights and achieve better outcomes for Americans. This partnership is special – very special."

"Through innovation and partnership, the Integrity platform continues to transform the way insurance and financial services are delivered," said Steve Young, Chairman of Integrity's Board of Directors. "We couldn't reach these milestones without amazing partners like Ash Brokerage who share our vision and values. Jim and Tim have always invested deeply in their community, clients and employees. Together, we will unlock a world of potential to grow alongside each other and deliver the solutions Americans need to feel secure for the good days ahead. Our commitment to serve is stronger than ever with Ash Brokerage at our side."

For more information about Ash Brokerage's decision to partner with Integrity, view a video at www.integritymarketing.com/AshBrokerage.

About Integrity Marketing Group

Integrity, headquartered in Dallas, Texas, is a leading distributor of life and health insurance, and provider of innovative solutions for wealth management and retirement planning. Through its partner network, Integrity helps millions of Americans protect their life, health and wealth with a commitment to meet them wherever they are – in person, over the phone and online. Integrity's cutting-edge technology helps streamline the insurance and financial planning experience for all stakeholders. In addition, Integrity develops products with carrier 

partners and markets them through its distribution network of agencies, brokerages and RIAs throughout the nation. Integrity's nearly 6,000 employees work with more than 420,000 agents and advisors who serve over 10 million clients annually. In 2021, Integrity helped carriers place more than \$10 billion in new sales and oversaw more than \$20 billion of assets under management and advisement through its RIA and broker-dealer platforms. For more information, visit www.integritymarketing.com.

About Ash Brokerage

Founded more than 50 years ago in Fort Wayne, Indiana, Ash Brokerage's more than 400 employees are focused on helping financial professionals innovate and secure the future through insurance products, including life insurance, annuities, long-term care and disability insurance. Ash Brokerage leverages relationships with more than 80 top-rated insurance carriers to help their 50,000 licensed agents find the best fit. Ash Brokerage has the tools – and the people – to bring solutions in every stage of life. In 2021, Ash Brokerage protected almost 50,000 lives, helping to place nearly \$2 billion of premium. Throughout their history, they have impacted nearly one million lives with their products and services. For more information, visit www.ashbrokerage.com.

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