

# Press Kit

Integrity Marketing Group Acquires Heartland Financial Group



September 7, 2022



## Integrity and Heartland Financial Group Partner to Transform Life, Health and Wealth Offerings for Seniors

Historic union of industry innovators will improve products and processes for all stakeholders and help more Americans plan for the good days ahead

**DALLAS - SEPTEMBER 7, 2022** - 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 [Heartland Financial Group](#) ("Heartland"), a leading independent marketing organization ("IMO") based outside Kansas City, Missouri. Heartland's executive team of Todd Hill, President and CEO; Bill Cole, Chief Operating Officer; and Tegrey Moot, Chief Sales Officer, will now become Managing Directors at Integrity. As part of the transition, Heartland's Founder, Chris McDaniel, will retire from Heartland, shifting his focus fully to insurance product development at his insurance company. Financial terms of the transaction were not disclosed.

Heartland was founded in 1992 by industry veteran Chris McDaniel to provide life, health and annuity products to the senior market. Over the next three decades, he assembled a forward-thinking leadership team that has helped the company continue to grow and expand. Following a serious health challenge in 2015, McDaniel transferred day-to-day leadership of Heartland to Todd Hill, who helped guide the company to new levels of success. Heartland has consistently remained at the forefront of technology and developed proprietary systems and products to better support the changing needs of agents and consumers. Together with executive leadership team members Bill Cole, Tegrey Moot and others, Hill will work to steer Heartland into an exciting new phase of opportunity and growth as an Integrity partner.

"Heartland Financial Group is a proven industry leader and their mission of supporting and helping Americans prepare for retirement aligns perfectly with Integrity," shared Bryan W. Adams, Co-Founder and CEO of Integrity. "We're grateful for Chris McDaniel's vision, which has thoughtfully positioned Heartland into an organization we're proud to partner with. We're also grateful to Todd Hill and the experienced executive leadership team at Heartland for embracing our vision of strengthening their technology and offerings in ways that will help them serve even more consumers. This partnership has been a long time in the making, and it will greatly enhance Integrity's mission to provide holistic life, health and wealth protection and planning solutions to all Americans."

"When you have a successful company with a proven track record, you approach the idea of partnership carefully. We found Integrity to be a perfect fit in terms of culture and vision right from the beginning," explained Todd Hill, President and CEO of Heartland. "As a true partner, Integrity allows us to continue to lead the agency while optimizing processes and reinforcing its success with improved technology and shared services. This partnership will help us serve more Americans in countless ways, and we can't wait to see how we'll grow together."

As the senior market continues to expand, the need for holistic life, health and wealth protection continues to accelerate. Integrity has brought together a renowned group of industry leaders and legends who collaborate on solutions that comprehensively protect the wellbeing of consumers for a more secure future. By supporting each other and

defining best practices, members of the Integrity partner network are improving insurance and financial processes in reassuring ways — and helping American families plan for the good days ahead.

“Integrity is innovating and improving the industry from top to bottom — we want to be part of that transformation,” said Tegrey Moot, Chief Sales Officer of Heartland. “It became very clear to us that Integrity understands we’re in a service-first business, and that every aspect of this partnership would help us better serve all our stakeholders. The solutions and resources accessible through Integrity’s platform offer us countless opportunities to capture organic growth and motivate new agents for the future. It’s truly a scenario where everyone wins.”

Both Integrity and Heartland are committed to empowering agents and serving the needs of Americans wherever they are. Through Integrity’s end-to-end insurtech platform, Heartland can supplement its own proven systems and confidently provide its agents with world-class technology and support. The Integrity platform includes valuable resources, such as customer relationship management software, innovative product design, real-time data and analytics, and access to Integrity’s state-of-the-art marketing and advertising capabilities. Heartland can also utilize Integrity’s centralized business services to achieve greater procedural efficiency in areas such as Technology & Innovation, People & Culture, finance, legal and compliance.

“At Heartland, we’ve always worked to provide better service by staying ahead of technology,” explained Bill Cole, Chief Operating Officer of Heartland. “When we saw how we can integrate and enhance our offerings with Integrity’s insurtech platform, we knew this was the right opportunity for us. We’re excited to leverage Integrity’s proprietary products and systems to help our agents create more holistic plans for their clients, because we know the value innovative solutions provide.”

Additionally, Heartland’s employees receive the remarkable benefit of meaningful employee ownership in one of the nation’s fastest growing companies through the [Integrity Employee Ownership Plan](#).

“During this process, it was important to me to ensure the amazing team that helped build Heartland was well taken care of,” explained Chris McDaniel, Founder of Heartland. “Integrity offers employees the incredible benefit of company ownership and has brought together an outstanding network of partners to offer strategic guidance for Heartland’s next phase. I’m proud of what we’ve accomplished and grateful to entrust the next phase of Heartland’s growth to Todd and the executive team. With Integrity at its side, Heartland will continue its purpose-driven growth for many years to come. I’m excited about the opportunities ahead for all of Heartland’s employees, agents and clients.”

For more information about Heartland’s partnership with Integrity, view a video at [www.integritymarketing.com/HFG](http://www.integritymarketing.com/HFG).

#### 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 nationwide distribution network. Integrity's nearly 6,000 employees work with approximately 500,000 agents and advisors who serve more than 11 million clients annually. In 2022, Integrity will help carriers place almost \$20 billion in new sales and oversee more than \$30 billion of assets under management and advisement through its RIA and broker-dealer platforms. For more information, visit [www.integritymarketing.com](http://www.integritymarketing.com).

#### About Heartland Financial Group

Heartland Financial Group, headquartered near Kansas City, Missouri, is a leader in life and health insurance, and the annuities space. Since its founding in 1992, Heartland has successfully pioneered an industry paradigm shift with agent reporting, commission automation and a service-first mentality. Heartland has additional office locations in Mississippi, Florida, Oklahoma and California, and supports more than 65,000 actively contracted agents. In 2021, Heartland completed approximately 165,000 applications and placed \$270 million in annual premium. For more information, visit [www.hfgagents.com](http://www.hfgagents.com).

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# Bryan W. Adams

Co-Founder & CEO



Bryan is the Co-Founder and Chief Executive Officer for Integrity Marketing Group and leads the day-to-day operations of the company. Bryan also serves on the Board of Directors of Integrity.

Bryan is the founder of Legacy Safeguard, LLC a company dedicated with helping members leave a lasting legacy and being remembered long after they're gone. Bryan is considered one of the nation's leading experts in the senior market and speaks frequently across the country about the importance of helping families on one of the most difficult days of their lives. He consults with leading insurance companies to help them offer the best products to this market.

Prior to founding Integrity, Bryan was Vice President of Business Development at Directors Investment Group, Inc., a financial services company that operates several life insurance companies, a registered investment advisory firm, bank holding company and a mutual fund family. Advancing through a series of leadership roles in sales, marketing and product development, Bryan became the youngest Vice President in the company's history, where he oversaw all expansion efforts throughout the United States.

Bryan has a degree in Business Administration from Texas Tech University. Bryan and his family live in Highland Village, Texas.



## Todd Hill

Managing Director

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Todd Hill is President and CEO of Heartland Financial Group and a Managing Director at Integrity.

Todd began his professional career in 1995 as a stockbroker at a large investment firm, where he eventually became Vice President of Investments. In 2006, Todd transitioned his career into insurance, focusing on the senior market. Todd joined Heartland Financial Group in 2012 and was named President and CEO three years later. He has since guided the company to continued growth and success.

Todd and his wife, Mandi, have four children: Aspen, Maverick, Laramie, and Journey. In his spare time, Todd enjoys hunting, collecting WWII memorabilia and watching his kids play sports.



## Bill Cole

Managing Director

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Bill Cole is Chief Operations Officer of Heartland Financial Group and a Managing Director at Integrity.

Bill began his career in 2000 as a software engineer with one of the largest audio manufacturing companies in the world. He developed custom productions and tested software to streamline and ensure quality. Bill later joined a software company as the Director of Support, overseeing quality service for more than 2,500 clients worldwide.

In 2010, Bill brought his deep expertise and standout work ethic to a large insurance company, where he helped develop revolutionary proprietary software and reporting solutions, business operations and a strong network of agents. He joined the Heartland team in 2018 and has been a key player in reimagining and restructuring Heartland's infrastructure and operations.

Bill and his wife, Jennifer, have four children and currently reside in Lee's Summit, Missouri.



# Tegrey Moot

Managing Director



Tegrey Moot is Chief Sales Officer of Heartland Financial Group and a Managing Director at Integrity.

Tegrey started in the insurance industry when he was 19 years old. He spent 14 years working for an IMO in Arizona, primarily building relationships with agents and insurance carriers across the country. Tegrey joined Heartland Financial Group in 2014 and currently leads sales efforts across all their product lines, including expanding agent distribution and developing new supplement plans with major name brand carriers. With over 20 years of experience, Tegrey has helped grow Heartland's Medicare Supplement premium to over \$400 million since he joined the company.

Tegrey and his wife, Kirstie, currently reside in Independence, Missouri, with their three dogs. He enjoys playing golf and traveling.



