

AmeriLife's ORCA Life Welcomes Advance Planning Partners

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Culmination of nearly decade-long partnership brings performative final expense shop officially under the ORCA Life banner



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ORCA Life, a leader in the final expense insurance market and an affiliate of **AmeriLife** Group, LLC ("AmeriLife"), announced today that it has formally partnered with Advance Planning Partners. Per the agreement, terms of the deal were not disclosed.

Advance Planning Partners is a Louisville-based final expense shop with offices in Denver, Houston, Charlotte and Morgantown, W.Va. The firm's co-owners, Richard Shawn and Michael Huffman, were founding members of ORCA Life in 2016. Now, together with ORCA and alongside its founder and president, **Glenn Crabtree**, Advance Planning Partners will have expanded access to the best-in-class leadership and resources of ORCA and AmeriLife, including new products and solutions in the Medicare and retirement income space.

"Richard and Michael have been a part of the fabric of ORCA Life since the beginning, and today's announcement is the culmination of our longstanding partnership and belief in what we've build together," said Crabtree. "I couldn't be more excited to welcome Advance Planning Partners into the fold, and we look forward to helping them continue to grow their company."

Advance Planning Partners will continue to operate under the ORCA banner, while both Shawn and Huffman will remain in their roles as members of ORCA's executive leadership team.

"I'm incredibly proud of what we've built at Advance Planning Partners, and am thrilled to make our longstanding connection with ORCA Life official," said Shawn. "We've only scratched the surface of our potential. The sky's truly the limit as we venture into new territory with more diverse product offerings and the backing of ORCA and AmeriLife."

"This is, indeed, an exciting day, not only for me and Richard, but for our affiliated agents as well," added Huffman. "This new yet familiar partnership will not only serve to accelerate our company's growth, but also ensure that our agents are armed with the very best tools, technology and contracts to take their books of business to the next level."

"I'm thrilled to welcome Richard and Michael to the AmeriLife family of companies under Glenn's and ORCA Life's continued guidance," said **Scotty Elliott**, AmeriLife's Chief Distribution Officer for Health. "Since partnering with ORCA in 2021, AmeriLife has witnessed firsthand their team's uncompromising drive to deliver for their clients. The addition of Advance Planning Partners will undoubtedly strengthen both organizations, and we're excited to further fuel their collective success."

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About AmeriLife

AmeriLife's strength is its mission: to provide insurance and retirement solutions to help people live longer, healthier lives. In doing so, AmeriLife has become recognized as the leader in developing, marketing, and distributing life and health insurance, annuities and retirement planning solutions to enhance the lives of pre-retirees and retirees across the United States. For more than 50 years, AmeriLife has partnered with top insurance carriers to provide value and quality to customers served through a distribution network of over 300,000 insurance agents and advisors and 120 marketing organizations and insurance agency locations nationwide. For more information, visit [AmeriLife.com](https://www.amerilife.com), and follow AmeriLife on [Facebook](#) and [LinkedIn](#).

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