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Integrity Announces Transformational Acquisition of The Quantum Group to Expand Holistic Offerings

March 27, 2025

The Quantum Group's best-in-class life and annuity sales platform joins Integrity to provide more Americans with annuity solutions as part of holistic retirement planning

DALLAS – MARCH 27, 2025 – 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 a definitive agreement to acquire [The Quantum Group](#) (“Quantum”), an independent distribution company based in Scottsdale, Arizona. As part of the acquisition, operations will continue to be led by [Ron Shurts](#), Chairman and Co-Founder of Quantum, and [Jim Maschek](#), Managing Partner of Quantum. Additionally, Shurts and Maschek will serve as Managing Partners in Integrity. Financial details of the acquisition were not disclosed.

The Quantum Group is recognized as a leading authority on fixed indexed annuity (FIA) and life insurance products that serves advisors with its proprietary platform, providing registered investment advisors (RIAs) and broker-dealers with access to tailored insurance solutions. Using a consultative approach, Quantum helps advisors navigate financial products and retirement strategies to create optimal client outcomes. The firm’s education and training platform helps advisors choose from more than 400 FIA products and 200 life insurance options to determine the best asset allocation for each client’s specific goals.

Through powerful partnerships with the nation’s leading product development companies, Quantum offers custom-designed distribution products, giving advisors access to highly sought exclusive options. Additionally, Quantum supports advisors in brand-building through integrated business development and strategic marketing, while also providing them with streamlined operations, technology, and client acquisition support, as well as advanced planning and portfolio solutions to scale and grow their businesses. With concierge service standards, Quantum specializes in helping both new and tenured advisors increase their impact with custom education and support designed specifically for their business needs.

“The best relationships are those where you trust the other person implicitly — I’ve known Ron Shurts for many years and have tremendous respect for him and the impressive organizations he has built,” expressed Bryan W. Adams, Co-Founder and CEO of Integrity. “As we are expanding our holistic platform to provide more comprehensive offerings, it is evident that the Quantum team shares Integrity’s passion for service. They also bring impressive knowledge and expertise in every aspect of the annuity and life insurance business.”

“This partnership unlocks innumerable opportunities for Integrity’s rapidly growing network of advisors and agents, who can now access the market’s best FIA and life insurance education and training platform to improve the lives of their clients,” continued Adams. “Our complementary capabilities will

yield a flywheel effect that accelerates success, resulting in more consumer-centric offerings. Going forward, the synergies between our teams will fuel ongoing innovation to help even more Americans make the most of what life brings. We couldn't be more excited to welcome Quantum into the Integrity family, and we look forward to transforming the marketplace together!"

"Bryan and I share the same vision — we are creating a smoother path for advisors to bring life-changing financial solutions to more Americans," said Ron Shurts, Chairman and Co-Founder of Quantum. "By partnering with Integrity, we're expanding the breadth of available solutions for both our advisors and Integrity's expansive network of agents and advisors. I'm also thrilled to now offer company ownership to our incredible team through Integrity's [Employee Ownership Plan](#). As employee owners, each member of our team will have a meaningful stake in fundamentally serving people better. Together, Quantum and Integrity will set a new standard of holistic protection and retirement preparedness within the financial advisory landscape — this partnership is truly just the beginning."

"Our partnership with Integrity opens groundbreaking growth opportunities for both Quantum and Integrity advisors and agents," said Jim Maschek, Managing Partner at Quantum. "The Integrity platform is strengthened by Quantum's deep expertise in the annuity and life insurance space. Likewise, the FIA solutions we offer can now be delivered to more Americans than ever before through Integrity's unmatched distribution network. For the first time, Quantum advisors gain access to a cross-functional life, health and wealth platform that facilitates the holistic planning and solutions today's clients want. After 25 years of working together at Quantum, Ron and I are excited to now have a partner in Integrity to help us advance our transformative vision even faster!"

In a traditionally fragmented market, Integrity draws together forward-thinking leaders to create synergistic solutions that benefit families in their most crucial moments and help them plan for the good days ahead. Visionaries and innovators from leading insurance and financial services companies are aligning their talents and futures with Integrity to collaborate and deliver more holistic life, health and wealth protection.

"Integrity has always attracted trailblazers from many fields, and Quantum is the clear leader in advisor support and education for those looking to grow their business," said Tom Dempsey, Chief Distribution Officer at Integrity. "The company's focus on advisor empowerment continues to make an enormous impact on the industry. With exclusive relationships with the leading FIA innovators, Quantum provides Integrity partners with access to the best solutions and services on the market backed by world-class support. This marks an exciting new chapter for Quantum, Integrity and the industry at

large, as we expand our impact and help more Americans than ever before manage what they've earned and prepare for more secure retirements.”

Integrity's expansive proprietary technology is built to optimize every touchpoint in the insurance and financial services process. The [advanced platform](#) includes instantaneous quoting and enrollment capabilities and simplified policy management through [MedicareCENTER](#) and [LifeCENTER](#). These solutions are supported by [Ask Integrity™](#), an AI-enabled and voice-activated digital assistant that utilizes key insights and recommendations to strengthen customer relationships. Additionally, Integrity's broad infrastructure helps advisors and agents propel their business forward. It streamlines business operations and administration, offers extensive data and analytics and provides access to strategic leadership guidance.

Now as Integrity partners, Quantum employees will take part in the impactful [Employee Ownership Plan](#), which provides meaningful company ownership from the first day of partnership. Founded in 2019, this program has already paid out an impressive \$175 million to company employees.

“This partnership is a remarkable pairing between world-class leaders whose capabilities and vision elevate each other,” said Steve Young, Integrity's Chairman of the Board. “Millions of Americans are actively seeking greater financial security — and this partnership makes agents and advisors better equipped to serve them. Quantum's cutting-edge training, research and product access will enhance Integrity's innovative technology suite to provide financial professionals with streamlined systems that help them better advise their clients. Our broad-based focus on life, health and wealth protection took an important step forward today that will provide even stronger retirement planning solutions to the families who need them.”

About Integrity

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 broad partner network of agents and advisors, 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 proprietary, cutting-edge technology helps expand the insurance and financial planning experience for all stakeholders using an omnichannel approach. In addition, Integrity develops products with carrier partners and markets them compliantly through its nationwide distribution network. Providing best-in-class service to their clients and consumers is at the center of Integrity's holistic approach to life, health and wealth protection. The company and its partners focus on helping

families and individuals prepare for the good days ahead, so they can make the most of what life brings. For more information, visit www.integrity.com.

About The Quantum Group

Based in Scottsdale, Arizona, The Quantum Group is a leading independent distribution company with an insurance platform providing access to more than 400 annuity and 200 insurance products, some with exclusive distribution. Quantum is laser-focused on education, providing financial advisor partners nationwide with the training, knowledge and resources they need to confidently address their clients' financial planning needs. Advisors and their clients require a partner able to navigate through the entire range of financial services and retirement strategies available today — a partner delivering a truly client-centric and integrated consultative approach. As part of its value proposition, Quantum delivers a whole range of added services including integrated business development, strategic marketing, client acquisition, streamlined operations, technology, as well as advanced planning and portfolio solutions. Quantum continually strives to embody the next evolution of financial advisory firm support. For more information, visit www.thequantum.com.

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