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Winged Keel Group Further Expands Southwest Presence with Acquisition of Bridge Life

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NEW YORK--([BUSINESS WIRE](#))--Winged Keel Group ("Winged Keel") today announced the acquisition of Bridge Life, a Denver-based provider of advanced life insurance planning for affluent and ultra-affluent clients founded by industry veteran Jay Cleary. Jay and his team of brokerage service professionals will join forces with the team in Winged Keel's Denver office. This transaction expands Winged Keel's platform and reinforces its position as the premier destination for distinguished life insurance advisors and their clients nationally.

For more than thirty years, Jay has been highly regarded throughout the insurance industry for his leadership and expertise in helping clients achieve their wealth accumulation, estate, and retirement benefit planning goals. Bridge Life's decision to align with Winged Keel underscores the firm's reputation as the partner of choice for advisors looking to maximize their impact through the firm's robust client service and technology platform and its delivery of innovative life insurance solutions. Jay joins Winged Keel as a Principal and will lead the Denver office alongside Winged Keel Principal Mark Richards.

CEO Eric Naison-Phillips said, "We're pleased to welcome the Bridge Life team to Winged Keel. Their reputation for integrity and client stewardship in Denver fits perfectly with our premier national platform for high-end life insurance. Together, the Winged Keel Denver office delivers an impressive depth of expertise and experience, which combined with the strength of our national administrative platform, will allow us to continue to enhance our market leading client offering."

"Joining Winged Keel was an easy decision. I can rest assured that our clients and advisor partners have access to a deeper bench of technical resources, purpose-built infrastructure, and a true national service model for generations to come," said Cleary. "The leadership team at Winged Keel is truly the best of the best, and I'm inspired by the collaborative client-first approach that guides every interaction. The firm's independence and long-term orientation are fully aligned with our commitment to service our clients for their lifetimes, and we're excited to bring the benefits of Winged Keel's platform to our client and advisor community."

"Jay has been a close friend for many years, and I have long admired him and his contributions to the insurance industry," said Richards. "It has been my dream to unite our teams under one roof. Since joining Winged Keel with my team in 2023, our expanded capabilities have resulted in our practice flourishing well beyond our expectations. I'm thrilled for this next chapter for Jay, and for the synergies of our collective team."

This marks Winged Keel's fourth acquisition in the last year, following acquisitions and new office openings in St. Louis, Minneapolis, and Nashville. Coupled with the addition of new Client Relationship Managers in New York, New Jersey, Philadelphia, and Washington, D.C., Winged Keel has enhanced its ability to serve clients and advisor platforms nationally and deliver on the mission to provide the premier home for the insurance industry's top advisors to accelerate the growth of their practices.

Michael S. Hollander, Managing Director of GTCR, added: "Since making our investment in Winged Keel earlier this year, GTCR has been continually impressed by Winged Keel's ability to attract and integrate onto its platform the highest-caliber brokers in the industry, and Jay and his team are no exception. Each new acquisition reinforces the firm's industry-leading position as the insurance brokerage platform of choice."

About Winged Keel Group

Winged Keel Group is the premier national platform for the structuring, implementation, and administration of high-end life insurance solutions. With coverage teams across 15 markets nationally, the firm specializes in Traditional Life Insurance, Business Continuation Insurance, Private Placement Life Insurance and Annuities, and Corporate-Owned Life Insurance portfolios. For more information on Winged Keel Group, please visit www.wingedkeel.com.

Securities offered through M Holdings Securities, Inc., a Registered Broker/Dealer, Member FINRA/SIPC. Winged Keel Group is independently owned and operated. #4863839

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WINGED KEEL GROUP

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Headquarters: New York, NY
Website: www.wingedkeel.com
CEO: Eric Naison-Phillips
Employees: 120
Organization: PRI

RELEASE VERSIONS

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