

# Simplicity Continues its Momentum with the Acquisition of Wholehan Marketing, Adding Chris Wholehan and Jessica Hernandez as the Group's Newest Partners



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**Simplicity Group Holdings →**  
Feb 10, 2026, 09:00 ET

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SUMMIT, N.J., Feb. 10, 2026 /PRNewswire/ -- Simplicity Group ("Simplicity"), a holistic financial planning firm combining the best of accumulation and protection strategies and solutions, today announced the acquisition of Wholehan Marketing ("Wholehan"), a brokerage general agency offering a diverse suite of financial products across life, annuity, DI, LTC and advanced market support with offices in Tampa, FL and Toledo, OH. This acquisition continues Simplicity's momentum and adds Chris Wholehan and Jessica Hernandez as new Partners. It signifies an expansion of Simplicity's offerings and reach, providing Wholehan's advisors with access to Simplicity's platform, marketing engine, and broad product suite.

"We are thrilled to welcome Chris and Jessica to the Simplicity partnership. This is a high-caliber team with a proven track record in life insurance, annuities, DI, and LTC, and they are eager to scale their impact using our platform," said Bruce Donaldson, Partner and CEO of Simplicity. "By integrating into Simplicity and utilizing our robust marketing engine, Wholehan's point-of-sale capabilities will expand, and its advisors will see immediate, tangible benefits for their businesses."

"Partnering with Simplicity Group marks a pivotal milestone for our team," said Chris Wholehan. "This move grants us access to an elite network and a broad product suite that will provide immediate advantages to our agents. By tapping into Simplicity's immense scale and collective intelligence, we are ready to set a new standard for the service we deliver to our clients."

## **About Wholehan Marketing**

*Wholehan Marketing offers a consultative approach to case design, product solutions, underwriting and suitability guidance to support our advisor clients nationwide. Since 1987, Wholehan Marketing has grown into one of the most well respected independently-owned brokerage agencies— serving insurance agents, financial advisors, and registered representatives all to help grow their business. For more information, please visit [www.wholehan.com](http://www.wholehan.com).*

## **About Simplicity Group**

*Simplicity is the leading partner for advisors, financial institutions, and consumers by delivering the best combination of wealth accumulation and financial protection products that meet the needs of a consumer-oriented holistic financial plan. As one of the*


fastest growing partnerships in the financial services industry, *Simplicity offers an unrivalled array of tools and technologies to grow and protect wealth, which can be accessed through **affiliation, outsourcing, or joining the partnership**. In an ever-changing environment, *Simplicity's commitment to working in our clients' best interest is unwavering and has always been anchored to our commitment to **Education, Value, and Partnership**. For more information, please visit: [www.simplicitygroup.com](http://www.simplicitygroup.com) and follow the Company on [LinkedIn](#).**

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