PRESS ROOM

Creative Planning Expands Commercial Insurance Capabilities With Addition of Lovell Insurance Group

OVERLAND PARK, Kan. — July 14, 2026 — Creative Planning, one of the nation's leading registered investment advisory firms, today announced the acquisition of Lovell Insurance Group, a respected commercial insurance brokerage known for its expertise in complex commercial insurance, surety

and risk management solutions. As part of the transaction, John Lovell, Mike Pernice and Georgia Williams have joined the Creative Planning team.

Founded on the principle of delivering boutique-level service with national experience, Lovell Insurance Group has built a strong reputation by serving upper middle-market businesses in Kansas City and across the country. The firm has differentiated itself through technical expertise, innovative risk management strategies, transparency and an unwavering commitment to client service.

The addition of Lovell Insurance Group further strengthens Creative Planning's expanding commercial insurance capabilities while enhancing the firm's ability to deliver comprehensive solutions to business owners. By combining sophisticated commercial insurance and surety expertise with Creative Planning's business advisory services, including accounting, tax, legal, M&A, technology, payroll, retirement and wealth management, clients will benefit from a strengthened integrated approach to protecting and growing their business and personal wealth.

"John, Mike and Georgia have built an outstanding business by putting clients first and delivering exceptional expertise in commercial insurance," said Creative Planning President and CEO Peter Mallouk. "We're excited to welcome them to Creative Planning. Their experience, integrity and commitment to service align perfectly with our culture, and together we'll be able to provide business owners with an even more comprehensive, coordinated approach to managing risk and achieving their long-term financial goals."

For John Lovell, joining Creative Planning represents an opportunity to build on Lovell Insurance Group's strong foundation while expanding the value delivered to clients.

“Lovell has always excelled in complex commercial insurance and risk management,” said John Lovell, Partner and Director of Sales, Commercial Insurance at Creative Planning. “By joining forces with Creative Planning, we’re now able to deliver even greater value through their outstanding insurance capabilities, deep resources, and exceptional production and service talent already within the firm.

“Our clients — both current and future — benefit from insurance and risk management expertise seamlessly integrated with wealth management, tax planning, estate planning, retirement plan consulting and investment advisory services. This powerful combination creates truly comprehensive strategies that can provide strong asset protection and lasting peace of mind for business owners and their families.”

The acquisition reflects Creative Planning’s continued strategy of expanding its specialized business services while maintaining the client-first philosophy that has driven the firm’s growth. With additional resources, specialized expertise and an integrated platform, the combined team is well positioned to help business owners address increasingly complex risk management and financial planning needs.

About Creative Planning

Creative Planning, LLC is an independent wealth management firm that provides a financial planning-led investment management approach, retirement planning, estate planning, trust services, tax advice and family office services for individuals as well as business services and institutional money management. Creative Planning and its affiliates have more than $710 billion in assets under management or advisement as of December 31, 2025. SageView Advisory Group, United Capital Financial Advisors, Baseline Wealth Management Ltd. and MASECO, LLP are affiliates of Creative Planning.

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