Higginbotham Joins Forces with Two West Capital Advisors to Grow Retirement Plan Business Across the Footprint

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Kansas City-Based Specialist Brings Deep Middle-Market Experience and a Scalable Platform

FORT WORTH, Texas, Aug. 27, 2026 /PRNewswire/ -- Higginbotham, a broad-based, employee-owned insurance and financial services company headquartered in Texas, has joined forces with Kansas City-based Two West Capital Advisors. The specialty firm will bring its full team, experience and operating platform to Higginbotham's growing retirement planning and wealth management division.

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"Bringing the Two West team on board immediately takes our capabilities in the retirement planning and wealth management space to another level," said Higginbotham Chairman and CEO Rusty Reid. "They bring an established platform, along with a business philosophy and ideals of service that fit naturally with ours."

Two West brings Higginbotham a proven team and platform to scale retirement plan services across the entire client base.

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Founded in 2010, with client relationships dating back to 2004, Two West serves a wide range of both employers and individual investors. Two West CEO Marko Ungashick explained that the firm was built around a simple idea: bring deeper retirement plan guidance to small and middle-market employers.

"I'm the son of entrepreneurs, and I dedicated my career to helping small businesses succeed. When I looked at the 401(k) planning space, I saw a market dominated by generalists, with expertise reserved for the largest clients," Ungashick said. "We built Two West to bring specialized knowledge and fiduciary responsibility to the middle market — businesses like the one I grew up in."

That focus made Higginbotham a natural fit, as both firms have built their businesses around serving middle-market employers with capabilities more often reserved for larger clients. What made their conversation a breakthrough was that Higginbotham wasn't simply interested in Two West's book of business.

"Higginbotham didn't come in wanting to talk," Ungashick said. "They came in wanting to listen — to hear about our team, the systems and the platform we had built, and to see how we could grow it together."

That is exactly what the combination is designed to do. Two West will remain based in Kansas City and continue serving its existing clients, with all current teammates on board — and new ones coming in as the firm actively recruits for expected growth. That team will gain the support of Higginbotham's broader HR, marketing, legal and compliance infrastructure, while Two West employees also become employee-owners in the larger organization.

But most importantly, Two West will gain access to Higginbotham's national reach and extensive existing business-client base — creating a significant new market for the retirement plan and wealth management platform it has already built.

"Our business has always been about investing in people and simplifying something that can be incredibly complex," Ungashick said. "Higginbotham gives us the opportunity to keep doing that for the clients and teammates who got us here, while bringing what we have built to a much larger audience. We believe this is the beginning of an even bigger story."

ABOUT TWO WEST CAPITAL ADVISORS

Prior to joining forces with Higginbotham, Two West Capital Advisors was an independent Kansas City-based retirement plan consulting and wealth management firm serving employers and individuals. The firm specialized in fiduciary retirement plan consulting, including 401(k) and 403(b) plans, as well as financial planning and wealth management. Learn more at **twowestadvisors.com**.

ABOUT HIGGINBOTHAM

Higginbotham is an employee-owned leader in insurance, financial services and employee benefits. Since 1948, the company has combined national reach with local expertise, ranking as the 16th largest independent insurance brokerage in the U.S. in 2026 according to The Hales Report. Higginbotham delivers customized programs supported by its Day Two Services®, designed to ensure that clients receive proactive guidance and support throughout the life of every policy.

Guided by a values-driven culture, the company is committed to its employees, clients, carrier partners and the communities it serves. Learn more at **higginbotham.com**.

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