Simplicity Acquires Mobile Bay Financial to Expand Holistic Financial Planning and Wealth Management Footprint and Welcomes John McNeil and Virginia O'Brien as New Partners

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SUMMIT, N.J., Aug. 4, 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 Mobile Bay Financial Solutions, LLC ("Mobile Bay"), a premier independent financial advisory firm located in Mobile, Alabama. Following the acquisition, John McNeil and Virginia O'Brien will become Simplicity's newest partners and Mobile Bay will rebrand as Simplicity Wealth Advisors: Mobile Bay, utilizing Simplicity's advanced suite of holistic planning tools, investment strategies, and back-office support.

"John, Virginia, and the entire team at Mobile Bay Financial embody the exact client-first values that define the Simplicity partnership," said Bruce Donaldson, Partner and CEO of Simplicity Group. "Their deep community roots and commitment to tailored retirement planning make this new partnership an ideal fit. By marrying their regional expertise with Simplicity's nationally-renown wealth management platform and scale, we know Simplicity Wealth Advisors: Mobile Bay will enhance their client offerings and deliver even greater financial security to the families they advise."

"Joining Simplicity is an incredibly exciting step that allows us to dramatically expand the resources, tools, and options available to our clients," said John McNeil. "As a fourth-generation family provider – and a third generation myself -- protecting our clients' legacy and future has always been our highest priority. Simplicity's robust technology platform and institutional support will eliminate administrative friction, empowering us to focus entirely on guiding our clients toward their ideal retirement."

"For over 104 years, our mission at Mobile Bay has been to build trusted financial blueprints that give our clients total peace of mind," added Virginia O'Brien. "Partnering with Simplicity preserves our team's local culture while aligning us with a world-class network where everyone shares true equity and rises together. This collaboration positions us beautifully to continue serving our community for generations to come."

About Mobile Bay Financial

Mobile Bay Financial Solutions, LLC is an independent financial advisory firm based in Mobile, Alabama. Co-founded by John McNeil and Virginia O'Brien, the multi-generational firm delivers tailored retirement planning designed to help clients bridge their financial realities to their lifelong dreams. Dedicated to deeply personalized service, Mobile Bay Financial helps families build, protect, and enjoy their wealth throughout their golden years. For more information, please visit ***www.mbfinancialsolutions.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*** *and follow the Company on* ***LinkedIn****.*

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