Simplicity Group Acquires Whitney and Associates, Expanding Presence in Des Moines as it Welcomes Mitch Whitney and Charles Johnson as the Group's Newest Partners



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SUMMIT, N.J., Sept. 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 Whitney and Associates, LLC ("Whitney"), a premier independent marketing organization based in Des Moines, Iowa. The transaction also includes the acquisition of Altitude Capital Management RIA, an integrated platform offering wealth and investment management solutions. At the same time, Simplicity welcomes Mitchell Whitney and Charles Johnson as the Group's newest Partners.

"We are thrilled to welcome the Whitney and Associates team to Simplicity," said Bruce Donaldson, President and CEO of Simplicity. "The Whitney platform provides forward-thinking supports for financial advisors and a strong operational platform all of which aligns perfectly with our vision of providing unmatched value, scale, and marketing support to independent financial advisors nationwide. By combining the Whitney advisor supports with our unrivalled Securities platform, we know that financial advisors across the country will benefit from this new partnership."

"Joining Simplicity represents a major milestone for our firm and the advisors we serve," said Mitchell Whitney. "By combining our innovative marketing strategies and digital lead generation tools with Simplicity's national scale, institutional resources, and advanced Agent Center, we can empower our financial advisors to grow their practices faster and serve their clients even more effectively."

"Our priority has always been to deliver hands-on, high-touch support to independent financial advisors," added Charles Johnson. "Partnering with Simplicity allows us to elevate our service model, expand our product offerings, and provide our dual-licensed advisors with a stronger wealth management infrastructure through Simplicity Securities."

About Whitney and Associates

Based in Des Moines, Iowa, Whitney and Associates LLC is a premier wholesale IMO providing specialized annuity, life insurance, and wealth management solutions to independent advisors. Together with Altitude Capital Management RIA, the firm delivers comprehensive marketing strategies, proprietary digital lead generation tools, and backend operational support. For more information, visit ***https://whitneyandassociates.net/****.*

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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