Ty J. Young Wealth Management acquires Washington-based insurance firm

This is at least the third annuity book acquisition the company has announced in three weeks



MERGERS & ACQUISITIONS

By Josh Recamara

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Ty J. Young Wealth Management has acquired Senior Insurance Services, an insurance firm led by Eric Rudd in Washington, Missouri, giving Rudd's clients continuity of service as he exits the insurance industry.

Terms of the transaction were not disclosed.

Ty Young, CEO of the Atlanta-based firm, framed the acquisition around what happens to a retiring advisor's client relationships rather than the transaction itself.

"We are grateful for the opportunity to carry forward the relationships Mr. Rudd has built with his clients. As an annuity book of business buyer, our goal is to keep your

clients cared for by providing the attention, service and guidance they need. We acquire annuity books with a commitment to making each transition personal and seamless," Young said.

A business model built specifically around advisor retirement

The Senior Insurance Services deal is not an isolated transaction but the latest in a steady, well-documented sequence of similar acquisitions.

Ty J. Young Wealth Management acquired Ray Cessna Advisory in Conroe, Texas, in mid-August, and has closed a series of other annuity book purchases throughout 2026, including McCarrell Insurance and Moore Insurance Services, each framed in nearly identical terms around continuity for clients of a retiring insurance or annuity professional.

In July, the firm launched WeBuyAnnuityBooks.com, a dedicated educational platform aimed specifically at independent fixed indexed annuity professionals considering an exit.

Young has continued promoting that positioning directly to the advisor community, appearing on Midland National's Mic'd Up with Midland podcast in July to discuss valuing, buying and selling an annuity practice, drawing on what the firm describes as decades of experience acquiring annuity practices nationally.

A structural trend, not just one firm's strategy

Industry observers tracking succession-driven M&A describe this kind of transaction as one of the more active segments of the broader wealth management deal market in 2026, as a wave of advisor retirements continues to outpace the availability of internal or peer succession options at small, solo-practitioner insurance and annuity agencies.

That dynamic mirrors a pattern seen across independent insurance agency consolidation more broadly, where a large, well-capitalized buyer becomes a default succession option for owners who lack a viable internal transition plan, applied here

specifically to annuity and fixed indexed annuity books rather than broader property and casualty agencies.

Founded in 1998, Ty J. Young Wealth Management now manages more than $1 billion in assets for nearly 10,000 clients nationally, a scale built substantially through this same acquisition approach rather than organic growth alone.

Why this matters for annuity professionals and IMOs

For independent annuity agents, insurance marketing organizations and retirement-income advisors weighing their own exit options, the Senior Insurance Services deal is a concrete, recent example of how this specific succession model plays out in practice.

Given how directly Ty J. Young has built its public messaging and even a standalone website around this exact transition question, advisors evaluating succession options now have both a documented acquisition track record and an explicit educational resource to assess before deciding whether this kind of buyer fits their own retirement timeline and client base.

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