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Winged Keel Group Expands National Presence and PPLI Leadership, Welcomes SBSI, Inc. (dba NFP Insurance Solutions)

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NEW YORK--(BUSINESS WIRE)--Winged Keel Group ("Winged Keel") today announced it has acquired SBSI, Inc. (dba NFP Insurance Solutions), a Chicago-based independent insurance advisory firm serving ultra high net worth and family office clients nationwide. SBSI, Inc. (dba NFP Insurance Solutions), which has an established Private Placement Life Insurance (PPLI) practice, is led by Howard Sharfman and Warren McGuire, two highly respected industry leaders. The entire team has joined Winged Keel, further strengthening the firm's presence across the country and establishing a new Winged Keel office in Chicago. This integration extends Winged Keel's position as the leading national platform for the structuring, implementation, and administration of high-end life insurance solutions.

"We're thrilled to welcome the SBSI, Inc. team to Winged Keel," said Eric Naison-Phillips, CEO of Winged Keel. "Howard, Warren, and their talented team have built an outstanding organization with a strong track record of client-centric success in the ultra high net worth life insurance market, including in PPLI. Their team brings deep relationships with centers of influence, financial institutions, and family offices, along with a culture aligned with Winged Keel's focus on growth, innovation, and integrity, all of which will help us advance our evolution and deliver even more value to clients."

SBSI, Inc. has been advising clients on life insurance solutions for more than 100 years. They are among the nation's largest firms specializing in life insurance and wealth transfer solutions for ultra high net worth individuals and families with multi-generational wealth. Over the past decade, the firm has placed over $18 billion of life insurance coverage.

"This is a fantastic combination of two leading firms in the high-end life insurance space," said Sharfman. "I have admired Winged Keel for years, especially their leadership in PPLI. From a position of strength and through the integration of our people, relationships, and capabilities, we will create new opportunities and a clear long-term succession plan to deliver more value to our clients well into the future. Through this integration with Winged Keel, we are also expanding our geographic reach, gaining access to new resources and infrastructure, collaborating with some of the industry's top talent, and elevating our culture with a firm that shares our values. We're excited to partner with Eric and the team, learn from each other, and continue building something special."

Sharfman and McGuire are now Principals of Winged Keel. In addition, Sharfman has joined the firm's Executive Management Committee.

Winged Keel, which entered into a strategic partnership with GTCR, LLC, in February 2025, continues its significant activity in acquiring and integrating leading firms in the ultra high net worth life insurance market. This transaction marks Winged Keel's fourth acquisition since the GTCR investment, joining strategic acquisitions that established offices in St. Louis and Minneapolis, and expanded the firm's presence in Denver. Winged Keel will continue exploring opportunities that enhance the team's ability to serve the dynamic needs of clients and advisors nationally and advance its position as the insurance brokerage platform of choice.

About Winged Keel Group

Winged Keel Group is the premier national platform for the structuring, implementation, and administration of high-end life insurance solutions. With coverage teams across 19 markets nationally, the firm specializes in Traditional Life Insurance, Business Continuation Insurance, Private Placement Life Insurance and Annuities, and Corporate-Owned Life Insurance portfolios. For more information on Winged Keel Group, please visit www.wingedkeel.com.

Securities offered through M Holdings Securities, Inc., a Registered Broker/Dealer, Member FINRA/SIPC. Winged Keel Group is independently owned and operated. #06302026-5701084

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