

Simplicity Acquires Optima Financial & Insurance Services and Welcomes Jon Salomon and Greg Olson as Partners

Summit, N.J. (March 8, 2022) – The Simplicity Group ("Simplicity"), one of the nation's leading financial products distribution businesses, today announced the acquisition of San Rafael, CA-based Optima Financial & Insurance Services. The financial services firm, with a focus on Life and Annuity products, is the 33rd company to join Simplicity.

With the successful closing of this transaction, Simplicity welcomes Jon Salomon and Greg Olson as partners, both of whom will continue to lead their office and serve their clients while transitioning to the Simplicity brand.

"Jon and Greg are well-regarded in the industry for their commitment to training and education, and the high level of care they provide their agent partners," said Bruce Donaldson, President and CEO of Simplicity. "Simplicity's values are well aligned with Optima's, and we look forward to assisting Jon and Greg as they continue to build on their strong foundation by helping agents bring value and security to their clients, as they prepare for, and enter, retirement."

"Greg and I are thrilled to become part of Simplicity Group and join such an exemplary team of partners," said Jon Salomon, President, Optima Financial & Insurance Services. "We are excited to offer the new resources that come with a Simplicity partnership, and we know our agents and advisors, together with the clients they serve, will be excited for future growth."

Greg Olson, Vice President, Optima Financial & Insurance Services added, "It is clear why Simplicity is a leader in this business: the people they have assembled, the resources they have developed, and the value they provide is unparalleled, and on behalf of the entire Optima team, we are proud to be a Simplicity company."

About Optima Financial and Insurance Services

Founded in 2009, Optima Financial & Insurance Services offers robust training and education, along with an array of life and annuity products, to advisor partners.

About Simplicity Group

The Simplicity Group is one of the nation's largest and fastest-growing financial products distribution companies, which has had 33 distribution businesses join its partnership (including Optima Financial & Insurance Services). Each of Simplicity's operating businesses is directed by its local management team and benefits from access to Simplicity's group resources. Through partnership with top distribution organizations and technology companies, Simplicity seeks to provide compelling business solutions that will attract the industry's best leadership, talent, advisors, agents, and future partners.

Simplicity supports independent financial advisors and agents across the country with investment, annuity, and life insurance solutions with a focus on client education, consumer value and partnership. For more information about Simplicity, please visit: www.simplicitygroup.com and follow the Company on [LinkedIn](#).

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