

Simplicity Group Agrees to Acquire LifePro Financial Services and Will Welcome Heather Ulz and Ben Nevejans as Partners

Summit, N.J. (July 7, 2022) – The Simplicity Group ("Simplicity") today announced that it has entered into a definitive agreement to acquire LifePro Financial Services, Inc. ("LifePro"), a San Diego-based financial products distribution business serving independent financial professionals across the country with a range of financial planning and sales and marketing supports. The agreement with LifePro marks the 39th acquisition for Simplicity. Heather Ulz, Ben Nevejans, and the LifePro team will continue to manage the business with the additional resources of the Simplicity Group.

"LifePro combines the best of a well-respected founder culture, an exceptional management team, and an employee-ownership mentality that are the hallmarks of great, enduring businesses. Bill Zimmerman had the vision and commitment to position LifePro as a market leader and Heather, Ben and the LifePro team have made that vision a reality – we are thrilled to welcome them as partners," said Bruce Donaldson, President and CEO of Simplicity. "Simplicity has an unrivalled track record of helping our new partners grow their business and better serve their clients and we will work to support LifePro's current growth trajectory."

"We have had a long and successful relationship with Simplicity and are excited to join the group, work alongside a network of talented professionals, and tap into their extensive resources," said Heather Ulz. "Our shared values and mutual respect – as people and as business partners – are what makes this partnership so exciting for the entire LifePro team."

Ben Nevejans added, "Joining forces with Simplicity will allow us to accelerate our growth and focus on what we do best: deliver superior service, support, and products to help agents and advisors across the country. We couldn't be happier as we look forward to entering into this incredible partnership."

About LifePro

LifePro Financial Services, Inc. is a premier distributor of life, annuity, long-term care, and securities-based insurance products serving financial professionals nationwide. The company was formed solely to help independent insurance agents, financial planners, and other financial service professionals become successful. LifePro understands that its success depends on its customers' success. For more information, please visit <https://www.lifepro.com/>

About Simplicity Group

The Simplicity Group is one of the nation's largest and fastest-growing financial product distribution companies, which has had 39 distribution businesses join its partnership (including LifePro). 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, please visit: www.simplicitygroup.com and follow the Company on [LinkedIn](#).



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