

Simplicity Welcomes Daly Brokerage as Kelly Daly and Lori Caiaze Join as New Partners

Summit, NJ (November 2, 2022) – Simplicity Group ("Simplicity") today announced the acquisition of Connecticut-based Daly Brokerage, which was founded in 1997 by Kelly Daly. Over the last 25 years, Daly Brokerage has established itself as a leading, full-service wholesaling firm dedicated to providing superior service and products in the areas of life, annuity, and long-term care. Together with her partner Lori Caiaze, Kelly and their team at Daly Brokerage have delivered an unparalleled level of service to their network of agent partners. Daly Brokerage is the 45th organization to join the Simplicity Group and Kelly and Lori are now Partners at Simplicity.

"Kelly, Lori and the entire Daly Brokerage team have built a great and enduring business and they embody all the key principles of Simplicity," said Bruce Donaldson, President and CEO of Simplicity. "Daly Brokerage is an acknowledged leader in their target markets and we are excited to support Kelly and Lori as Daly Brokerage enters its next phase of growth."

"When I reflect upon the business that my team and I built over the last 25 years, and I look at the trends in our industry, I know that there is no better partner than Simplicity for our future success," said Kelly Daly. "The culture of collaboration, coupled with the resources available to us, is a perfect platform for success."

"We are thrilled to partner with Simplicity and tap into the sales training and marketing resources available to us and our agent partners," said Lori Caiaze. "The Daly Brokerage team is all in for this next phase of our growth."

About Daly Brokerage

Since being formed in 1997, Daly Brokerage has consistently provided superior service and a wide variety of top-rated products to its network of brokers to help their clients mitigate risk. Each member of Daly Brokerage works hard and commits their professionalism to be an outstanding brokerage platform and resource. For more information, please visit www.dalybrokerage.com

About Simplicity Group

Simplicity Group is one of the nation's largest and fastest-growing financial product distribution companies, which has had 45 distribution businesses join its partnership (including Daly Brokerage). 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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