

Simplicity Welcomes Marketing Financial to the Group as Alan Lockhart Joins as Partner

Summit, N.J. (November 3, 2022) – Simplicity Group ("Simplicity") today announced its 46th acquisition: Springfield, Missouri-based, Marketing Financial. The company, led by Alan Lockhart who becomes a Simplicity Group partner following this transaction, is a full-service wholesaling firm focused on supporting advisors within banks, credit unions and broker-dealers with life insurance, annuities, executive benefits, disability, and long-term care insurance products.

"As our partnership grows, we are happy to welcome dedicated professionals like Alan and his team to the group," said Bruce Donaldson, President and CEO of Simplicity. "Marketing Financial is an acknowledged leader at working with financial institutions and independent agents and we know that Alan and the team will continue their growth with the additional resources available through Simplicity."

"I am thoroughly impressed with the caliber and depth of the product bench, operational support, and marketing assets available through Simplicity Group, and I know our team shares my enthusiasm to bring this new level of service to our agents and advisors," said Alan Lockhart. "I am proud of the business we have built and look forward to growing it as part of the Simplicity Group."

About Marketing Financial

Launched in 1989, Marketing Financial is a full-service brokerage and consulting firm that works with professionals, marketing groups, associations, agencies, and other financial entities such as CPAs, banks, trust companies and broker-dealers. Marketing Financial's mission is to provide their clients and partners the best life insurance, annuities, premium financing, buy-sell planning, estate planning, executive benefits, disability, and long-term care insurance products, as well as operational support, marketing consultation, and partnership alliance programs to help grow their businesses.

About Simplicity Group

Simplicity Group is one of the nation's largest and fastest-growing financial product distribution companies, which has had 46 distribution businesses join its partnership (including Marketing Financial). 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](#).

###

MEDIA CONTACTS

Denielle Webb
Simplicity Group
P: 347-204-7181 / E: denielle.webb@simplicitygroup.com

Alex Timeus
Simplicity Group
P: 201-987-7176 / E: alex.timeus@simplicitygroup.com