

Simplicity Financial Marketing Acquires Two Strong Insurance Distribution Companies

FINANCIAL MARKETING ORGANIZATION PURCHASES WEALTHWISE
PARTNERS AND LIBERTY FINANCIAL



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Simplicity Financial Marketing →

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HARTFORD, Conn., Sept. 14, 2017 /PRNewswire/ -- National independent insurance distribution company, Simplicity Financial Marketing, has acquired both WealthWise Partners LLC and Liberty Financial Resources, Inc., two high-growth, independent insurance distribution companies (IDCs).

Founded in 2013 and based in Atlanta, WealthWise Partners was an independent insurance distribution company providing financial professionals with top-rated products and innovative marketing solutions. The principals, Jason Chaifetz and Jamie Cline, developed a boutique-style approach that will enhance Simplicity's approach to advisors and agents. "We're really excited to join the Simplicity team," said Chaifetz, new Principal of Simplicity. "We are always looking to offer our advisors the best marketing systems and services. The added resources that Simplicity brings to the table allows us to do just that."

Based in Cleveland and founded in 2000, Liberty Financial Resources, now re-branded Simplicity Marketing, provides resources and support to help financial professionals reach their potential. "As part of the Simplicity organization, we can leverage the size and scale of their resources, marketing programs and proprietary products," said Kevin Arsham, past President of Liberty Financial Resources and current Principal of Simplicity Marketing. "We are well

positioned for growth, to hire and retain the most talented staff and compete for the top advisors in the industry. Simplicity management and I share a common vision, and I look forward to working with this well-thought-of and respected team."

These acquisitions are the third and fourth insurance distribution companies acquired by Simplicity Financial Marketing this year and will broaden the market position of the Simplicity group of companies as one of the largest distributors of annuities and life insurance in the U.S.

"Simplicity Financial Marketing is growing rapidly and breaking new ground," Simplicity's CEO, Bill Malloy, said. "We represent one of the top annuity, life insurance, and retirement solution companies in the industry—allowing us to bring an even stronger lineup of insurance and financial products to our customers."

With the acquisition, Simplicity will have 175 employees in 12 offices. The company continues to pursue a strategy of growth by identifying specific opportunities to expand its reach and benefit its customers.

Simplicity will be organized around several Centers of Excellence to grow its distribution and to significantly expand its footprint in the Independent, Life Insurance, Broker-Dealer, and Partner Firm channels.

About Simplicity Financial Marketing

Simplicity Financial Marketing is one of the nation's largest financial marketing organizations--providing annuity, life insurance, and retirement solutions to independent insurance professionals, financial advisors and their clients. Headquartered in Hartford, CT, Simplicity is known for its premier services and solutions, as well as leading and operating with the strongest compliant and ethical bearings.

Working with over 20,000 financial professionals, 100 partner agencies and 30 broker-dealer partners, Simplicity brings exceptional value and quality to the industry and its customers.

For more information about Simplicity Marketing, visit www.simplicitymarketing.com or call 800.201.0224.

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