

# Simplicity Group Acquires Guardian Financial Group and Welcomes Jerry Whitley as its Newest Partner

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**Simplicity Group** →

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SUMMIT, N.J., May 6, 2021 /PRNewswire/ -- Simplicity Group ("Simplicity") is pleased to announce that it has added Guardian Financial Group to the Simplicity Group of companies and welcomes Jerry Whitley as its newest partner and shareholder through a transaction that closed effective May 3. Guardian Financial Group, which will rebrand to Simplicity, provides specialized financial planning advice tailored to the unique needs of religious leaders and their families. Guardian will maintain its offices in Mansfield, Texas but will continue to serve its clients across the country.

"Jerry Whitley is an industry pioneer and is uniquely qualified to provide financial guidance to those qualified men and women who have dedicated their lives to leadership through faith. Guardian has built the leading planning practice for these families, addressing their unique financial and tax planning needs," stated Bruce Donaldson, Simplicity's President and Chief Executive Officer. "We look forward to welcoming Jerry and the Guardian team to the Simplicity family."

"We are thrilled about the partnership with Simplicity," shared new Simplicity Partner Jerry Whitley, who together with Sharon Whitley, founded Guardian Financial Group. "By joining with Simplicity now, we have increased our ability to serve our clients with the breadth and depth of Simplicity's resources. I know we will be able to help more of our clients and their families secure a sound financial future in retirement."

The Guardian Financial Group transaction represents another growth milestone for Simplicity, marking the 23<sup>rd</sup> organization to join the Simplicity Group of companies. Each of Simplicity's operating businesses is directed by its local management team and immediately enjoys the benefit of being able to access Simplicity's group resources, including best-in-class sales and marketing programs and back-office functions. Through partnerships 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.

### ***About the Simplicity Group***

*Simplicity Group has acquired and owns 23 distribution businesses and is one of the nation's largest and fastest growing financial product distribution companies. Simplicity provides annuity, life insurance, and investment solutions to independent insurance professionals, financial advisors and their clients through its operating subsidiaries. For more information about Simplicity, please visit: [www.simplicitygroup.com](http://www.simplicitygroup.com).*

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