

Press Kit

Integrity Surprises Employees with \$125 Million Payout and Equity Ownership in the Insurtech Leader



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Innovative and generous plan offers meaningful company ownership to all company employees, allowing them to share in Integrity's success

DALLAS - DECEMBER 21, 2021 - On the heels of a \$1.2 billion minority equity investment and just in time for the holidays, Integrity Marketing Group, LLC ("Integrity"), an omnichannel insurtech leader in life, health and wealth solutions, today surprised its 5,500 employees with an unexpected \$125 million in cash payouts to employees participating in the company's Employee Ownership Plan.

The company further shocked employees by awarding equity units to all those who had yet to qualify for them through the plan — making every current full-time Integrity employee an official owner of the company. Integrity's Co-Founder and CEO, Bryan W. Adams, traveled across the country to meet in person with over 2,000 of the company's employees — and virtually with the remainder of Integrity's 120 offices — to share the news and distribute the \$125 million. Eligible employees will receive cash awards of varying size, based on factors such as position and tenure. Employees who have participated in the program since its 2019 inception will receive a minimum of \$8,000, and still have an estimated \$60,000 in current equity value remaining in company shares.

"Integrity is a business built by caring and committed people who go the extra mile to help other people. Two years ago, we became an employee-owned company with our innovative Employee Ownership Plan, which gave ownership in our company to all our employees. As we experience success and create value as an insurtech company, we share that upside with all our employee owners," said Bryan W. Adams. "Our employees are the key to making our vision to transform the industries we serve a reality. We are thrilled to show

our gratitude by including our entire team in our success. By coming together to work, win, prosper and share, we have been able to create one of the industry's first companies where every employee is also an owner."

"Integrity is truly a company powered by people and we're passionate about our culture of giving back," said Steve Young, Integrity's Chairman of the Board. "Without question, our motivated, dedicated employees have made Integrity one of the fastest growing companies in America. We couldn't be happier to reward their contributions and dedication — and show them how appreciated they are by sharing in our growth."

Integrity has achieved an impressive year-over-year annual growth in excess of 100% for five years running, and has a one-of-a-kind omnichannel insurtech platform — with 420,000 agents serving more than 10 million clients annually. The company expects new sales in 2021 to exceed \$7 billion and to reach more than \$20 billion of assets under management and advisement through its RIA and broker-dealer platforms by the end of the year.

The company recently announced a strategic equity partnership led by [Silver Lake](#) to expand Integrity's digital innovation and insurtech capabilities.

"Integrity's culture of employee ownership is a key differentiator. It's an incredibly powerful way to align objectives that spur growth and reward people for delivering on

innovation,” said Egon Durban, Co-CEO of Silver Lake. “We are supportive of how the employee ownership program at Integrity is inclusive, sharing and demonstrates a belief in their people.”

“When you work with a committed, talented group of individuals who are helping improve the lives of Americans, the decision to share our success becomes an easy one,” explained Adams. “In addition to the \$125 million they’re receiving today, our employees will continue to have considerable equity ownership in Integrity. When you consider that the average household savings in America is roughly \$17,000, it’s easy to see how ownership can help our employees prepare for the good days ahead. This is unquestionably the most meaningful decision and outcome I’ve ever been part of in my career.”

Integrity became an employee-owned business in 2019 with the formation of the Employee Ownership Plan, and the company paid out a retroactive cash distribution of \$50 million to Integrity’s 750 employees at the time. With this latest payment, Integrity has now paid out a total of \$175 million to its employees in a little over two years through the Employee Ownership Plan.

“We want all of our employees to know they are in the right place, making valued contributions every day,” continued Adams. “Together, we are executing our mission to serve the life, health and wealth needs of Americans and help them prepare for the good days ahead. That makes it even more fitting that we share in the prosperity we achieve together.”

“I’ve been part of some incredible things throughout my career, but nothing comes close to the joy of being able to share true ownership with our employees — it’s a day that will change their lives forever, and the potential value it offers is unimaginable,” shared Young. “Integrity is committed to transforming the insurance and financial services industries, and what we’ve been able to achieve would not have been possible without the amazing team we’ve assembled. This unique opportunity and reward for our employees is well deserved.”

For more information about Integrity and their Employee Ownership Plan, please visit www.integritymarketing.com/news.

About Integrity Marketing Group

Integrity, headquartered in Dallas, Texas, is an omnichannel insurtech leader of life and health insurance, and provider of innovative solutions for wealth management and retirement planning. Through its partner network, Integrity helps millions of Americans protect their life, health and wealth with a commitment to meet them wherever they are — in person, over the phone and online. Integrity’s cutting-edge technology helps streamline the insurance and financial planning experience for all stakeholders. In addition, Integrity develops products with carrier partners and markets them through its distribution network of agencies, brokerages and RIAs throughout the nation. Integrity’s nearly 5,500 employees work with more than 420,000 agents and advisors who serve over 10 million clients annually. In 2021, Integrity expects to help carriers place more than \$7 billion in new sales and will oversee more than \$20 billion of assets under management and advisement through its RIA and broker-dealer platforms. For more information, visit www.integritymarketing.com.

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Bryan W. Adams

Co-Founder & CEO



Bryan is the Co-Founder and Chief Executive Officer for Integrity Marketing Group and leads the day-to-day operations of the company. Bryan also serves on the Board of Directors of Integrity.

Bryan is the founder of Legacy Safeguard, LLC a company dedicated with helping members leave a lasting legacy and being remembered long after they're gone. Bryan is considered one of the nation's leading experts in the senior market and speaks frequently across the country about the importance of helping families on one of the most difficult days of their lives. He consults with leading insurance companies to help them offer the best products to this market.

Prior to founding Integrity, Bryan was Vice President of Business Development at Directors Investment Group, Inc., a financial services company that operates several life insurance companies, a registered investment advisory firm, bank holding company and a mutual fund family. Advancing through a series of leadership roles in sales, marketing and product development, Bryan became the youngest Vice President in the company's history, where he oversaw all expansion efforts throughout the United States.

Bryan has a degree in Business Administration from Texas Tech University. Bryan and his family live in Highland Village, Texas.

