

Press Kit

Integrity Marketing Group Acquires The Health Insurance Place



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Integrity Expands Retail Insurance Presence by Partnering with The Health Insurance Place

Service-focused and innovative IMO with strong retail presence prepares for new phase of growth through Integrity's expanded product offerings and extensive carrier relationships

DALLAS - MARCH 10, 2022 - Integrity Marketing Group, LLC ("Integrity"), an omnichannel insurtech leader in life, health and wealth solutions, today announced it has acquired [The Health Insurance Place](#), an independent marketing organization ("IMO") based in Johnstown, Pennsylvania. As part of the acquisition, Joe Fortunato, President of The Health Insurance Place, will become a Managing Partner in Integrity. Financial terms of the transaction were not disclosed.

Fortunato began selling health insurance more than four decades ago as an individual producer before creating The Health Insurance Place in 1979. Today, his growing network of agents offers life, health as well as annuities. In addition, Fortunato pioneered retail health insurance walk-in locations in his region, staffed by knowledgeable professionals ready to answer questions and find solutions. Recognizing the complexity and constant fluctuation of the industry, Fortunato has maintained a welcoming environment within the centers to help consumers understand and select the right products for their needs and budget.

"Though Joe has been in the insurance business for 40 years, The Health Insurance Place still displays the energy of a start-up — the entire team is incredibly inspiring to be around," shared Bryan W. Adams, Co-Founder and CEO of Integrity. "Integrity offers The Health Insurance Place the benefits of a large organization while keeping the innovative spirit and dedication to service that has always been their hallmark. Joe and his team have found enormous success by serving clients where and when they need it. Integrity shares this

commitment to making the insurance process more convenient and accessible for everyone, as evidenced by our powerful technology solutions. By tapping into Integrity's end-to-end platform, The Health Insurance Place is positioned for success for years to come, and we're thrilled to welcome them to the team."

"We recognized early on that we could simplify the often-overwhelming insurance process for clients by focusing heavily on service," explained Joe Fortunato, President of The Health Insurance Place. "Integrity is all about keeping insurance streamlined and accessible by creating technology-driven solutions for agents and consumers. Their focus on service extends beyond insurtech to include wealth management and advisory services, which offer new avenues for our team to explore and more ways to help our clients. Integrity will help us further refine what we already do well and enhance the service we provide in the process. I can't wait for this next era of growth for The Health Insurance Place."

The Health Insurance Place will add its expertise to Integrity's increasingly broad and diverse network of partners, a peer group of leaders who develop and improve insurance and financial service processes. These forward-thinking companies collaborate to provide innovative solutions that better protect the life, health and wealth of all Americans.

Integrity is shaping the future of the industry by creating insurtech systems that improve the experience for all stakeholders. These resources, available exclusively through Integrity's

proprietary platform, include MedicareCENTER, customer relationship management systems, quoting and enrollment solutions, and access to a world-class advertising and marketing firm. Integrity will help The Health Insurance Place scale and become more efficient by centralizing business administration functions. Its supportive infrastructure of shared services includes Technology & Innovation, People & Culture, finance, legal and compliance.

Furthermore, The Health Insurance Place will now offer its employees meaningful company ownership through the [Integrity Employee Ownership Plan](#).

“When deciding to partner with Integrity, the Employee Ownership Plan was especially exciting to me,” continued Fortunato. “Integrity lets me continue to run the business with my team while motivating them through shared returns. There is no better way to reward them for their years of loyalty, creativity and service than including them in our success.”

For more information about The Health Insurance Place’s decision to partner with Integrity, view a video at www.integritymarketing.com/TheHealthInsurancePlace.

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 helped carriers place more than \$7 billion in new sales and oversaw more than \$20 billion of assets under management and advisement through its RIA and broker-dealer platforms. For more information, visit www.integritymarketing.com.

About The Health Insurance Place

The Health Insurance Place is a leading independent marketing organization (IMO) that offers convenient retail walk-in centers for health insurance, life insurance, and annuities. The agency’s insurance experts are available to answer questions and provide options that best suit client needs. With a growing network of brokers covering Pennsylvania in full, The Health Insurance Place supports hundreds of agents who currently serve over 23,000 insured members. The company remains focused on servicing two primary customer segments — independent agents and the individual clients they support. For more information, visit www.thehealthinsuranceplace.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.

Joe Fortunato

Managing Partner



Joseph Fortunato is the President of The Health Insurance Place and a Managing Partner at Integrity.

Joe earned his Associate Degree in Business in 1971, prior to entering the retail industry. Three years later, he was transferred from Pittsburgh to Johnstown, Pennsylvania to open a new retail location. He then obtained his Life, Health and Annuity License in 1979 and eventually joined the National Association of Health Underwriters, frequently meeting with federal and state representatives to discuss the health insurance industry.

Joe opened The Health Insurance Place in 1979, where the primary focus was on Medicare and supplemental plans, as well as annuity and life insurance policies. He has since added accident, critical illness, disability and worksite products to the company's portfolio. Healthcare reform led to the creation of retail walk-in centers. Today, the agency provides exceptional support to brokers while catering to health insurance clients seeking group, individual, Medicare and supplemental plans — all in a personalized, caring and thoughtful way.

He lives in Johnstown, Pennsylvania with his wife, Barbara, and enjoys spending time with his grandkids whenever possible.

