

# Press Kit

Integrity Marketing Group Acquires The Valdez Group



March 31, 2022



## Integrity Expands on Life and Retirement Protection for Middle Market by Acquiring The Valdez Group

Fast-growing Ohio-based brokerage will capitalize on the technology and data science driving the Integrity platform to provide security and peace of mind to more Americans

**DALLAS – MARCH 31, 2022** – Integrity Marketing Group, LLC (“Integrity”), a leading distributor of life and health insurance, and provider of wealth management and retirement solutions, today announced it has entered into an agreement to acquire [The Valdez Group](#), an independent marketing organization (“IMO”) based in Ontario, Ohio. As part of the acquisition, Eric Valdez, President of The Valdez Group, and Kimberly Harper-Valdez, Executive Vice President of The Valdez Group, will become Managing Partners in Integrity. Financial terms of the transaction were not disclosed.

Eric and Kimberly Valdez founded The Valdez Group to provide life insurance and retirement solutions to American consumers — especially those within the middle market. The Valdez’s passion for understanding consumer needs and creating the right solution for each scenario has resulted in substantial year-over-year growth. Today, The Valdez Group supports a fast-growing network of agents serving thousands of people in the Midwest and beyond.

“Eric and Kim are passionate about serving consumers — their work ethic and mindset of servant leadership are a model for our industry,” expressed Bryan W. Adams, Co-Founder and CEO of Integrity. “Now they have an incredible opportunity to expand their influence further through the Integrity platform. This partnership gives The Valdez Group the resources to scale nationally and thrive for years to come. Integrity brings out the best in a business by assembling many of the industry’s finest leaders who innovate together by

combining experience and expertise with best-in-class resources and technology. Eric and Kim are fantastic additions to the Integrity family, and I can’t wait to see how being part of Integrity will power their future.”

“In this business, relationships are everything,” shared Eric Valdez, President of The Valdez Group. “When Kim and I go to work every day, we know our work is bigger than just us — it’s about the many agents that rely on us to lead and the consumers they serve. It’s a trust we take very seriously. With Integrity shouldering the load of administration, Kim and I can do what we do best, which is building relationships and meeting the needs of the important middle market. Joining Integrity’s powerhouse of leaders will revitalize and push us to work harder than ever to protect families. Supported by Integrity’s technology and resources, I know there is nothing The Valdez Group can’t accomplish.”

“Service is a huge part of our DNA and it’s meaningful to know that the company we are locking arms with believes in the same type of leadership,” explained Kimberly Harper-Valdez, Executive Vice President of The Valdez Group. “Joining Integrity was an easy decision because our core values are the same. We believe our work is about helping people protect what’s most important to them, while making a difference in the lives of our agents and our teammates. We know we can’t accomplish our goals alone, and we are thrilled to have the resources and systems of Integrity to lean on. I’m confident we’ll do great things together — our best days are very much ahead of us.”

Eric and Kimberly's strong influence and leadership are a welcome addition to the other executive leaders who form the Integrity partner network. These legends and icons strive to create integrative and comprehensive solutions that ensure Americans are prepared for the good days ahead. By continually collaborating on best practices and strategies, Integrity partners optimize insurance and financial processes, making it possible for agents and advisors to better protect the life, health and wealth of all Americans.

The Valdez Group will save valuable time by seamlessly shifting much of its back-office support to Integrity. The shared business functions within Integrity's innovative partner platform include Technology & Innovation, People & Culture, finance, legal and compliance, and access to a world-class advertising and marketing agency. In addition, The Valdez Group can now quickly get to the heart of customer needs by taking advantage of Integrity's proprietary systems and resources, as well as expanded products. Offerings include customer relationship management software, real-time data and analytics, and ongoing product development.

These benefits are complemented by the [Integrity Employee Ownership Plan](#), which provides the opportunity for The Valdez Group to offer meaningful company ownership to its employees.

For more information about The Valdez Group's partnership with Integrity, view a video at [www.integritymarketing.com/TheValdezGroup](http://www.integritymarketing.com/TheValdezGroup).

#### About Integrity Marketing Group

Integrity, headquartered in Dallas, Texas, is a leading distributor 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](http://www.integritymarketing.com).

#### About The Valdez Group

The Valdez Group is headquartered in beautiful Ontario, Ohio, and is a rapidly growing life insurance distributor with a special focus on serving the middle market. The company helps people across the country find the life insurance and retirement solutions they need to protect their families and their future. The Valdez Group has partnered with industry-leading carriers to bring their agents a portfolio of products they can be proud to offer their clients. With an expanding team of dedicated agents, The Valdez Group has proudly served and protected over 35,000 clients nationwide. For more information, visit [www.thevaldezgroup.org](http://www.thevaldezgroup.org).

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# Bryan W. Adams

Co-Founder & CEO

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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.



# Eric Valdez

Managing Partner



Eric Valdez is President of The Valdez Group and a Managing Partner in Integrity.

After college, Eric ventured into sales, sales management and business development. He spent 20 years traveling across the country, eventually becoming a mortgage banker. As the mortgage industry was facing challenges in 2011 - 2012, Eric searched for something that could support his family, allow him freedom to serve and make a difference for others.

Eric was then introduced to the insurance industry by a long-time friend. After speaking with mentors Barry Clarkson, Rob Jones and Bill Martin, he knew he had found a place to grow. Under their leadership and guidance, Eric has been able to build and grow an agency founded on core values such as respect, ownership, relationships, toughness, positive attitude and humility. Eric, his wife Kim and everyone at The Valdez Group take great pride in serving the life insurance and retirement needs of middle-income Americans.

Eric builds his life and business with his wife, partner and eternal companion, Kim. They live in beautiful Ontario, Ohio, and love spending time with their combined family of five children and five grandchildren.



# Kim Harper-Valdez

Managing Partner

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Kimberly Harper-Valdez is Executive Vice President of The Valdez Group and a Managing Partner in Integrity.

After college, Kim spent 15 years traveling in sales and sales management positions. Eventually, she took a position that allowed her to stay home with her family, doing bookkeeping and customer care for a local pharmacy. In 2017, Kim's husband, Eric, invited her to help build a family business in the life insurance industry. As they've continued to learn and grow their business, they've come to realize that the industry's only real limit is your vision and willingness to work.

Kim builds her life and business with her husband, partner and eternal companion, Eric. They live in beautiful Ontario, Ohio, and adore and cherish their combined family of five children and five grandchildren.



