

# Press Kit

Integrity Marketing Group Acquires Applied General Agency (AGA)



April 12, 2022



## Applied General Agency and Integrity Partner to Bring Comprehensive Medicare Solutions to More Americans Across the Nation

Influential, California-based IMO with an expansive footprint will accelerate service and growth by providing Integrity's world-class technology and resources to Medicare agents and agencies

**DALLAS - APRIL 12, 2022** - Integrity Marketing Group, LLC ("Integrity"), a leading distributor of life and health insurance, and provider of wealth management and retirement planning solutions, today announced it has acquired [Applied General Agency](#) ("AGA"), an acclaimed independent marketing organization ("IMO") based in Anaheim, California. As part of the acquisition, Patrick Rodriguez, President of AGA, will become a Managing Partner in Integrity. Financial terms of the transaction were not disclosed.

"AGA is renowned across the nation for their incredible support and dedication to agents – it's clear they understand the importance of hard work and service," shared Bryan W. Adams, Co-Founder and CEO of Integrity. "It's always amazing to see families build successful businesses together, and we can't wait to come alongside Patrick, Natalie and their team to help them continue to expand throughout the country. Backed by Integrity's solid infrastructure and cutting-edge technology, this partnership will not only secure AGA's proud legacy, but also accelerate their growth. We're thrilled to welcome AGA to Integrity, and we can't wait to serve the Medicare coverage needs of more Americans together!"

Founded in 1993 by Patrick Rodriguez, AGA recognized the enormous opportunity to provide more personalized service to the independent agents and agencies who help Medicare beneficiaries obtain quality coverage. The company has grown to become one of the largest IMOs on the West Coast, supporting close to 10,000 agents who serve the healthcare needs of more than 500,000 Americans.

"AGA began with a two-part mission to meet the Medicare health insurance needs of Californians and to help our agents find success. With Integrity, we can fulfill both parts of that mission tenfold," explained Patrick Rodriguez, President of AGA. "Integrity's innovative, end-to-end platform will help the agents and agencies we serve reach more beneficiaries and improve health outcomes for countless Californians and Americans nationwide. We can now expand our product offerings with top carriers, benefit from stronger marketing, build world-class relationships with Integrity partners and offer enhanced benefits such as company ownership to our employees. It's a privilege for AGA to join forces with a dynamic leader like Integrity and I see nothing but incredible opportunities ahead of us."

Integrity eagerly welcomes AGA to the long list of fellow industry leaders whose deep expertise strengthens Integrity's partner network. With a common goal of protecting the life, health and wealth of all Americans, these diverse and innovative leaders connect, strategize and support each other in collectively working to develop and implement improved insurance and financial service processes.

"We have goals at AGA that are simply too big for us to accomplish on our own," shared Natalie Birchard, Vice President at AGA. "Having a partner like Integrity in our corner will help us build on all the things we do well now, while providing us with new systems and resources to help us continue to grow. We're particularly excited about the marketing and technology that Integrity offers. This partnership will allow us to focus more on supporting our agents and spend less time on business administration."

AGA will expand its already exceptional service by integrating Integrity's industry-leading proprietary technology and support platform. This extensive suite of systems and resources includes robust quoting and enrollment capabilities, real-time data and analytics, intuitive customer relationship management software, MedicareCENTER and access to a best-in-class advertising and marketing firm. Additionally, the company can deepen its commitment to growth and innovation by shifting the burden of administration to Integrity's expansive shared business services. This support infrastructure includes areas such as People & Culture, Technology and Innovation, finance, legal and compliance.

Rounding out these benefits is the opportunity for AGA to offer its employees meaningful company ownership through the [Integrity Employee Ownership Plan](#).

"As one of the highest performing companies in our industry, AGA deeply understands how vital Medicare is to the senior market," said Steve Young, Integrity's Chairman of the Board. "The Integrity platform will empower AGA's agents and agencies to use the industry's best resources and technology to reach more seniors with the coverage options they need and deserve. AGA shares Integrity's heart for service, and together we'll make a significant impact on the lives of more Americans every day. We're proud that AGA will now carry the Integrity name with them."

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

#### 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 Applied General Agency

Applied General Agency was founded by Patrick Rodriguez in 1993. Headquartered in Anaheim, California, AGA has become one of the largest Medicare-focused independent marketing organizations in the nation. AGA was created with the intention of providing unparalleled value to overworked agents who had more obligations than time. With the support of a full back-office team, AGA has the vision and tools to make quality agents even more successful. AGA has grown to support close to 10,000 agents in serving the needs of half a million Americans nationwide. For more information, visit [www.appliedga.com](http://www.appliedga.com).

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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.

# Patrick Rodriguez

Managing Partner



Patrick Rodriguez is the President of Applied General Agency (“AGA”) and Managing Partner at Integrity.

In 1993, Patrick launched AGA, which has since become one of the largest Medicare-focused field marketing organizations nationwide. He founded AGA with the intention of providing unparalleled value to overworked agents who had more obligations than time. With the support of a full back-office team, Patrick knew he had the vision and tools to make quality agents even more successful. By always striving for innovation and increased levels of service, he has kept AGA at the forefront of the Medicare industry.

Patrick has lived his whole life in Southern California with a great appreciation for its warm climate. As an outdoor enthusiast, he is passionate about golf, fishing and other sports. He is a fan of the Los Angeles Dodgers and enjoys spending quality time with his family — especially his grandkids.

“The AGA philosophy came to me while still an Independent Agent. That is: If you’re helping, you’re selling. If you’re just selling, you may not be helping.” -Patrick Rodriguez, 2016

Patrick has been navigating the ins-and-outs of the independent agent marketplace for over 30 years. He founded AGA in 1993 with the intention of providing unprecedented value to overworked agents who had more obligations than time. With the support of a full back-office team, Patrick knew he had the vision and tools to make quality agents even more successful. By always striving for innovation and increased levels of service, he has kept AGA at the forefront of the industry, all while inspiring AGA employees to maintain the highest levels of integrity and dedication to our client’s success.

