Press Kit

Integrity Marketing Group Acquires Russek Financial Services

INTEGRITY™

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Integrity Partnership Expands Russek Financial Services' Medicare and Retirement Planning Offerings

Experienced Northeastern agency with proven track record will use Integrity's best-in-class resources and support to scale its growth and protect the health and wealth of more Americans

DALLAS – MAY 10, 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 entered into an agreement to acquire Russek Financial Services, an insurance and financial planning agency based in North Haven, Connecticut. As part of the acquisition, Jeffrey Russek, President of Russek Financial Services, will become a Managing Partner in Integrity. Financial terms of the acquisition were not disclosed.

"Integrity continues to grow our life, health and wealth protection capabilities by partnering with exemplary companies, and today we've added yet another incredible partner — Russek Financial Services," shared Bryan W. Adams, Co-Founder and CEO of Integrity. "Integrity's technology and systems are tailor-made for successful agencies like this one. Jeffrey has always put his agents first, and now he can offer them access to more resources, better products and stronger insurtech solutions than ever before. In turn, through Integrity's one-of-a-kind platform, Jeffrey gains backing and bandwidth that allow him to devote more of his time and energy to serving his agents and clients. We couldn't be more excited to support Russek Financial Services' growth as they work to achieve new business goals and help more Americans plan for the good days ahead."

After more than a decade in corporate finance, Jeffrey Russek launched Russek Financial Services with the goal of providing peace of mind to his clients about the future of their health and wealth. The agency soon distinguished itself as a leader in helping seniors navigate Medicare, providing exceptional customer service and personalized solutions for each client's circumstances, with additional expertise offered by Certified Financial Planners. Today, Russek Financial Services offers a wide range of insurance products and retirement guidance to consumers across the Northeast.

"In this business, relationships are everything," explained Jeffrey Russek, President of Russek Financial Services. "It takes the right people to help your company succeed at the right time. Without question, Integrity is the right team to help us reach our next level of service and success. We believe in treating our clients the same honest and upfront way we would treat a family member, and that's helped us sustain close relationships with many of them for years. It was so gratifying to learn that Integrity treats their partners and clients with the same care and concern. They understand that what matters most is helping families find the coverage they need. With Integrity's cutting-edge technology, we can offer our clients so much more — from MedicareCENTER to advanced marketing resources. I'm so excited about Russek Financial Services' future as an Integrity partner."

Integrity will help Russek Financial Services streamline operations by incorporating the firm's back-office functions into its centralized business services. These areas include People & Culture, Technology and Innovation, finance, legal and compliance, and access to a world-class marketing and advertising firm. Additionally, Integrity's platform offers Russek Financial Services unsurpassed insurtech products and systems that help agents work more efficiently and meet consumers wherever they are. They include intuitive customer relationship management software, insightful data and analytics, and ongoing product development.

Russek's advisors will have the opportunity to contribute to and learn from Integrity's broad and diverse partner network. This exclusive peer group collaborates on best practices and strategies aimed at optimizing insurance and financial processes. By continually striving to create and integrate comprehensive solutions, agents and advisors can ensure more Americans are prepared for the good days ahead.

Furthermore, Russek Financial Services can now offer its employees meaningful company ownership through the Integrity Employee Ownership Plan.

For more information about Russek Financial Services' decision to join Integrity, view a video at www.integritymarketing.com/Russek.

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 6,000 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 $10 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 Russek Financial Services

Headquartered in North Haven, Connecticut, Russek Financial Services is a broadly diversified financial services company committed to helping people. They believe in establishing and fostering consultive client relationships, providing outstanding financial products and services, and offering significant opportunities for their team to provide meaningful advice and guidance to clients in the achievement of their financial goals and objectives. Russek Financial Services has over $75 million assets under management and advisement and serves thousands of clients annually. They strive to be the financial services provider of choice in every community they serve by demonstrating a level of ethics, competency and professionalism. For more information, visit www.insurancect.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.

Jeffrey Russek

Managing Partner

Jeffrey Russek is the President of Russek Financial Services and a Managing Partner at Integrity.

Born and raised in Connecticut, Jeffrey earned his BS in finance and MBA from the University of Connecticut. Since the start of his career, Jeffrey has focused on improving clients' long-term financial goals, freedom and security through retirement planning, investment management and insurance.

Jeffrey entered the insurance business in 1995. Four years later he founded Russek Financial Services, a wealth management and Medicare insurance business. In addition to being licensed in life and health insurance, he is also a Certified Financial Planner and a member of the Financial Planning Association (FPA), NAHU and the New Haven Chamber of Commerce.

Over the course of his career, Jeffrey has introduced, mentored and trained several people in the Medicare insurance business, helping them find productive and worthwhile professions. He has long believed that unbiased and honest advice, coupled with ethical business practices and personal integrity, are essential in building a solid practice.

The tagline for Russek Financial Services is "Always reaching for the top." Jeffrey was an avid mountain climber, having summited five of the "Seven Summits," the tallest mountain on each continent. Although he no longer goes after the big peaks, Jeffrey remains a passionate hiker.

Jeffrey lives in North Haven, Connecticut, with his wife, Tammy, and their daughter, Scarlett. They enjoy traveling, hiking, music, skiing, swimming and attending concerts.

[View downloadable photos]