

# Press Kit

Integrity Marketing Group Acquires Elevation Sales Coaching



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## Integrity Further Enhances Agent Development by Acquiring Elevation Sales Coaching

Consistently successful IMO with innovative training systems joins Integrity to connect with partner network and develop strong agent leaders

**DALLAS - OCTOBER 25, 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 [Elevation Sales Coaching](#) ("Elevation"), based in Wake Forest, North Carolina. As part of the acquisition, Jordan Smith, President of Elevation Sales Coaching, will become a Managing Partner in Integrity. Financial terms of the acquisition were not disclosed.

"Jordan and his team already understand how to achieve success — striving for excellence is at the core of their business," said Bryan W. Adams, Co-Founder and CEO of Integrity. "His consistent effort and winning mindset make Jordan an ideal partner. By utilizing Integrity's technology, customer relationship management resources, product development and analytics, Elevation can help agents reach their full potential to better serve even more Americans. We're always thrilled to add energetic, driven partners, and we welcome Elevation to our Integrity family."

Founded by Smith, Elevation provides expert education and accessible information that empower agents to improve their sales processes and maximize revenue. The company specializes in coaching agents who serve the senior market with final expense, life insurance, annuities or Medicare products. Elevation creates structures for personal and team growth and offers multifaceted product-level support to developing agents.

"Integrity attracts leaders, especially those who want to have a lasting impact on this industry," said Jordan Smith, President of Elevation Sales Coaching. "At Elevation, we are

also in the business of building and supporting leaders, which makes this partnership a fantastic fit. The resources Integrity has created would take us a decade or more to develop or invest in on our own. Though we could continue down our current path of growing organically, Integrity expedites our growth by diversifying our business and expanding our recruiting abilities. We've watched the powerful acceleration other Integrity partners have experienced and the difference that has made for agents and consumers, and we're very excited to see those same results at Elevation."

"Since joining Integrity, our business has more than doubled," shared Craig Harvey, Managing Partner at Integrity. "There is no way we could have accomplished this without the leadership, resources and influence of Integrity. Jordan is extremely driven and a natural leader. Through this partnership, we know his business will achieve milestones it couldn't attain without Integrity. Jordan and his team at Elevation will be a tremendous addition to Integrity — their best days are ahead of them."

Smith will add his extensive sales coaching expertise to Integrity's partner network, a rapidly-growing group of industry legends and icons who share best practices and collaborate on solutions that better protect the life, health and wealth of all Americans. These experts are optimizing insurance and financial service processes to help consumers plan for the good days ahead.

"Every week, we see more of the best and brightest companies in our industry join Integrity," expressed Chad Milner, Managing Partner at Integrity. "We've enjoyed collaborating

with other Integrity partners to drive sales and increase our growth every year. With his strong character, passion for helping others and ability to grow a business, Jordan will undoubtedly experience the ‘Integrity Effect.’ Without Integrity, you operate on an island on your own. Integrity’s technology keeps great companies like Elevation on the cutting edge and helps them feel confident in the opportunities ahead.”

Integrity’s platform of insurtech solutions unlocks a diverse range of new products and systems to Elevation, allowing them to provide agents with enhanced training value and services. Proprietary resources available to partners include Integrity’s MedicareCENTER platform and Mobile App, in-depth data and analytics, on-demand quoting and enrollment, and access to Integrity’s world-class advertising and marketing capabilities. Elevation can increase operational flexibility by utilizing Integrity’s shared business services. These administrative functions include support in areas such as People & Culture, Technology & Innovation, finance, legal and compliance.

Additionally, Elevation joins all Integrity partners in offering employees meaningful company ownership through the [Integrity Employee Ownership Plan](#).

For more information about Elevation’s decision to partner with Integrity, view a video at [www.integritymarketing.com/Elevation](http://www.integritymarketing.com/Elevation).

#### About Integrity

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 nationwide distribution network. Integrity’s nearly 6,000 employees work with approximately 500,000 agents and advisors who serve more than 11 million clients annually. In 2022, Integrity will help carriers place almost \$20 billion in new sales and oversee more than \$30 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 Elevation Sales Coaching

Elevation, founded in 2011, is based in Wake Forest, North Carolina, and is a leader in the simplified life insurance market. The agency also specializes in final expense, Medicare, annuities and retirement planning. To provide the best products and services, Elevation partners with leading carriers and focuses on developing agents and leaders to provide quality service in the senior market. In 2022, Elevation will serve over 150,000 clients and approach over \$100 million in annual paid premium. For more information, visit [www.elevation.market](http://www.elevation.market).

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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.



# Jordan Smith

Managing Partner

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Jordan Smith is the President of Elevation Sales Coaching, Senior Partner at North American Senior Benefits and a Managing Partner at Integrity.

Jordan began his insurance career in 2011 as an individual producer, leading from the front with impressive results. During his first 2 years, he was a top leader in personal production with both agencies he worked with. That early success helped Jordan realize that if he sold at a high level then he could recruit, coach and train at a high level. He was the first agent to earn Partner level at North American Senior Benefits and his team is approaching \$100 million in final expense paid premium annually.

Jordan currently resides in Wake Forest, North Carolina with his wife and 3 children, Bella, Brooklyn and Beckett.



