

Press Kit

Integrity Marketing Group Acquires Gladstone Wealth Partners



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Integrity Closes Transformative Acquisition of Gladstone Wealth Partners to Offer Expansive Wealth Management Solutions to Americans

Partnership strengthens company's wealth management expertise and expands synergies that allow for more holistic and comprehensive financial planning solutions

DALLAS - JANUARY 11, 2023 - Integrity Marketing Group, LLC ("Integrity"), a leading distributor of life and health insurance, and provider of wealth management and retirement planning solutions, today announced the closing of its acquisition of [Gladstone Wealth Partners, LLC](#) ("Gladstone"), a leading wealth management firm offering registered independent advisor and broker-dealer services. This transformative acquisition of Gladstone, which was one of the largest transactions in Integrity's history, brings Integrity's total assets under management and advisement to approximately \$40 billion. Financial terms of the acquisition were not disclosed.

This partnership will help accelerate Integrity's strategy by strengthening its holistic offerings for financial planning and amplifying its wealth management expertise, positioning the company for sustained growth and value creation. Integrity expects the partnership, first announced in August, to provide continued support of Gladstone in its impressive year-over-year increase in revenue, portfolio growth and advisor recruitment through the addition of Integrity's extensive and exclusive partner services.

"Integrity continues to actively grow its wealth management business through purposeful partnerships that strengthen and expand our offerings for advisors," explained Bryan W. Adams, Co-Founder and CEO of Integrity. "Today's leading financial professionals know their clients need innovative wealth management strategies to help secure their hard-earned assets and safeguard their retirement. By integrating Integrity's omnichannel capabilities with Gladstone's top-tier financial service expertise, we can offer more

comprehensive and holistic life, health and wealth planning solutions to more people than ever before. We look forward to providing ongoing innovation coupled with Gladstone's impressive leadership, as we advance our shared mission of helping Americans plan for the good days ahead."

"Even in today's economic climate, Gladstone has maintained a strong trajectory of growth and expansion," said Tom Dempsey, Chief Distribution Officer of Integrity. "Since our initial agreement to partner, Gladstone's portfolio grew at a rate more than double that of the S&P 500. While investor sentiment remained mixed to negative, Gladstone continued their streak of positive net flows each and every month. That is a remarkable achievement — especially considering the conditions surrounding equity markets during that time. It showcases well the visionary leadership of Gladstone, and the prowess of the expert team they've assembled. It also shows why we are so thrilled to officially welcome Gladstone to the Integrity family!"

Under terms of the acquisition agreement, Robert Hudson, Founder and Chairman of Gladstone, and Richard Frick, CEO of Gladstone, will continue leading operations at Gladstone. They will also take on additional roles as Managing Partners at Integrity, adding their sharp acumen and impressive wealth management expertise to Integrity's omnichannel platform of partner companies that offer everything from health and life insurance products, data analytics, third-party administration and advertising, to financial planning and wealth management.

“One of the most exciting aspects of this partnership is the far-reaching impact our synergies will have on the entire financial services industry,” said Robert Hudson, Founder and Chairman of Gladstone. “Gladstone’s extensive advisor support architecture and executive guidance perfectly complement Integrity’s full suite of technology, products and services in a way that empowers us to initiate more holistic outcomes for our advisors’ clients. Together, we will work to create a seamless ecosystem that gives financial service and insurance professionals the systems and resources they need to help their clients achieve lifelong financial goals.”

Integrity has advanced its vision of innovating financial services for all stakeholders through additional acquisitions of notable companies such as [Lion Street](#), [WealthFirm](#), [Ash Brokerage](#), [Annexus](#) and others. In concert with its relationship with Gladstone, these strategic partnerships expand Integrity’s national footprint and provide advisors with access to Integrity’s proprietary platform, offering cutting-edge product development and best-in-class technology to complement its product portfolio.

All partners also receive access to a body of unparalleled industry expertise through Integrity’s esteemed partner network. This trailblazing group of legends and icons regularly collaborate to refine best practices, develop strategies and optimize processes that protect the life, health and wealth of all Americans.

“We’re honored to join Integrity on its transformational journey to comprehensively improve financial services,” shared Richard Frick, CEO of Gladstone. “Alongside Integrity, Gladstone is deeply committed to purpose-driven growth that exceeds our already impressive track record. Successful financial planning must account for a full spectrum of broad-based client needs to provide the peace of mind Americans desire when planning for, moving into and experiencing retirement. We are excited about integrating with Integrity’s world-class resources to help advisors develop even more compelling and personalized recommendations that help build and protect wealth and assets, so their clients can make the most of what life brings.”

For more information about Gladstone and its decision to partner with Integrity, view a video at www.integritymarketing.com/GladstoneWealthPartners.

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 of over 500,000 agents and advisors, 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. In 2022, Integrity helped carriers place almost \$20 billion in new sales and oversaw more than \$40 billion of assets under management and advisement through its RIA and broker-dealer platforms. For more information, visit www.integritymarketing.com.

About Gladstone Wealth Partners

Gladstone Wealth Partners was founded in 2012 and launched its RIA in 2015. It has expanded to now oversee more than \$13 billion in assets under management and advisement. As one of the fastest growing hybrid RIAs in the wealth management industry, Gladstone is known for assisting advisors as they set up and establish their own independent advisory practice. This includes helping advisors better serve their clients, run their businesses more profitably, grow faster and enhance their enterprise value. For more information, visit www.gladstonewealth.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.

Robert Hudson

Managing Partner



Robert Hudson is the Founder and Chairman of Gladstone Wealth Partners and a Managing Partner at Integrity.

Robert founded Gladstone Wealth Partners, a wealth management enterprise, to help individuals and businesses in all aspects of their financial lives and to serve as a home for financial advisors to do the same for their clients. Robert's years of leadership and wealth management experience across the U.S. has earned him the trust and commitment of many in the industry. During the last 10 years, Robert has coached and mentored more than 200 successful financial advisors. Through Gladstone, Robert continues to lead wealth managers and advisors from all backgrounds to have the knowledge and confidence to be independent and ultimately create their own enterprise.

Robert is a graduate of Rutgers University. In his spare time, he enjoys golf and watching his daughters dance competitively. Robert's charitable passion is helping single parents finance further education for their children.

Richard Frick

Managing Partner



Richard Frick is the CEO of Gladstone Wealth Partners and a Managing Partner at Integrity.

Richard's broad and extensive background has set the foundation for him to successfully lead and innovate. Prior to joining Gladstone, he worked at a multinational investment management and financial services company in various leadership roles, including regional manager for Private Wealth Management and Complex Management. He also spent ten years in senior leadership at a leading bank and its predecessor firms.

Richard is from Whitehall, Pennsylvania, and is a graduate of Temple University. He currently lives in Naples, Florida, with his wife, Melanie, and their two daughters, Lilly and Carter. Richard and his wife are active in various charitable causes focusing on education, poverty and the arts.

