

## Simplicity and Passerelle Partners Join Forces

**Summit, NJ (November 9, 2023)** – Simplicity Group Holdings, Inc. ("Simplicity"), a leading financial products distribution firm, today announces a partnership with Passerelle Partners ("Passerelle"), a boutique insurance advisory firm, to build out its ultra-high net worth offering. Fernando Pou, Victoria Mayer, and Chris Daniels, founders of Passerelle, become Simplicity's newest partners.

"We are pleased to welcome the Passerelle team to Simplicity," said Bruce Donaldson, Partner and CEO of Simplicity. "Passerelle is a well-respected firm which continues to build on Simplicity's expertise in developing bespoke strategies for private clients and expands the company's international reach. We are confident that Simplicity's support and solutions will aid the Passerelle team as they continue to provide best-in-class products and services to their clients."

Passerelle specializes in advising ultra-high net worth clients globally as well as partnering with professional advisors in premium finance structures, bespoke financial products, and wealth management solutions. The company has a strong history of partnering with some of the world's most prestigious financial institutions, with decades of experience across a variety of top banking and asset management firms.

"We are excited to partner with Simplicity and expand their domestic and international ultra-high net worth growth vertical," said Fernando Pou, Managing Partner at Passerelle. "We share a common vision, culture, and work ethic that has continuously set us apart in the industry. This is a significant time for us, as we collectively enhance our resources, access, and our ability to provide innovative solutions to the market."

"We are proud to combine forces with Simplicity and leverage the benefits of scale and influence this partnership delivers, creating synergies and value for our clients, external partners and team," said Chris Daniels, Managing Partner at Passerelle.

Waller Helms Advisors acted as exclusive financial advisor to Passerelle Partners in the transaction.

### **About Passerelle Partners**

*Passerelle Partners is a leading insurance advisory firm with offices in Miami, Charlotte, Chicago, and Minneapolis. Passerelle caters to U.S. and international private clients as well as professional insurance advisors by delivering creative solutions to preserve and enhance their clients' assets and legacy. Passerelle focuses on asset diversification, wealth preservation, wealth transfer, and liability management solutions. For more information, please visit: [www.passerelle-partners.com](http://www.passerelle-partners.com) and follow the company on [LinkedIn](#).*

### **About Simplicity Group**

*Anchored on its hallmarks of education, value, and partnership, Simplicity Group is one of the nation's largest and fastest-growing financial product distribution companies. Simplicity supports independent financial professionals, banks, broker-dealers, and wealth management firms -- and by extension their clients -- with investment, annuity, and life insurance solutions, sales tools, and marketing strategies in support of a holistic financial plan. For more information, please visit: [www.simplicitygroup.com](http://www.simplicitygroup.com) and follow the Company on [LinkedIn](#).*

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