

Simplicity Acquires Brokers Edge and Welcomes Rich Hellerich to the Simplicity Partnership

Summit, NJ (March 26, 2025) – Simplicity Group Holdings, Inc. ("Simplicity"), a leading financial products distribution firm, today announced it has acquired Brokers Edge, a national wholesaler specializing in the development, marketing, and distribution of traditional fixed annuities, fixed indexed annuities, and life insurance products. With the successful closing of this transaction, Simplicity welcomes Brokers Edge's founder, Rich Hellerich, as its newest partner.

"Rich and his team have built a strong business and have a tremendous reputation in the annuity and life space, and a well-known dedication to providing advisors and their clients top-level service for over two decades," said Bruce Donaldson, Partner and CEO of Simplicity. "Their approach aligns with Simplicity's commitment to working in our clients' best interests, and we are thrilled to welcome Rich and the entire team to the organization."

"I have long admired the Simplicity team and could not be prouder to now be part of the nation's fastest-growing financial services organization," said Rich Hellerich. "The depth and breadth of the company's expertise and resources across life insurance, annuities, and securities, combined with the first-class professionals who make up the organization, made the decision to partner very easy. We are eager to work together to expand our life resources for our clients and build 'One Simplicity.'"

About Brokers Edge

Based in Lenexa, Kansas, Brokers Edge is a full-service BGA specializing in the development, marketing, and distribution of traditional fixed, fixed indexed annuities, and life insurance products. For more information, please visit <https://www.brokersedgeal.com/>

About Simplicity Group

Simplicity is the leading partner for advisors, financial institutions, and consumers by delivering the best combination of wealth accumulation and financial protection products that meet the needs of a consumer-oriented holistic financial plan. As one of the fastest growing partnerships in the financial services industry, Simplicity offers an unrivalled array of tools and technologies to grow and protect wealth, which can be accessed through affiliation, outsourcing, or joining the partnership. In an ever-changing environment, Simplicity's commitment to working in our clients' best interest is unwavering and has always been anchored to our commitment to Education, Value, and Partnership. For more information, please visit: www.simplicitygroup.com and follow the Company on [LinkedIn](#).

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