SIMPLICITY GROUP

NEWS RELEASE

# Simplicity Continues Expansion Strategy with the Acquisition of ATS Wealth Management, Welcoming Sandeep Varma, Nisha Varma, and Phylip Simmons to the Partnership

**Summit, NJ (April 13, 2025)** – Simplicity Group ("Simplicity"), a holistic financial planning firm combining the best of accumulation and protection strategies and solutions, today announced the acquisition of ATS Wealth Management (“ATS”), an investment management firm based in San Diego and Palo Alto. With this acquisition, Simplicity welcomes Sandeep Varma, Nisha Varma, and Phylip Simmons as the group’s newest partners.

Founded 36 years ago with a focus on advanced estate planning, ATS Wealth Management has built its practice around helping families create, preserve, and transfer wealth across generations. Today, the firm operates as a hybrid wealth management and financial solutions provider, offering investment management, retirement planning, and estate planning services rooted in a family-first philosophy. The firm is dedicated to helping clients build meaningful legacies that endure.

“We have partnered with ATS for more than 15 years and we are thrilled to welcome Sandeep Varma and the ATS team to the Simplicity partnership,” said Bruce Donaldson, Partner and CEO, Simplicity. “ATS shares our commitment to act in the best interests of clients, and we are confident that this collaboration—pairing their experience with our comprehensive platform—will drive significant value for all ATS’ clients.”

“We are honored to join Simplicity and gain access to the institutional resources that will allow us to serve our clients even more deeply for generations to come,” said Sandeep Varma. “For over 30 years, ATS has been grounded in advanced estate planning with a singular focus, helping families build legacies that extend well beyond their lifetimes. By engaging multiple generations in the planning process, ATS takes a family-first approach to wealth planning, bringing the entire family into the discussion around financial and estate strategies. Our emphasis on education, personalized strategies, and enduring relationships aligns seamlessly with Simplicity’s vision, and we are excited to continue guiding families for generations to come.”

**About ATS Wealth**

*ATS Wealth Management is dedicated to helping families build, protect, and transfer wealth in ways that create lasting legacies. With roots in advanced estate planning spanning more than three decades, ATS operates with a strong commitment to fiduciary responsibility and a holistic approach to financial planning. By integrating investment management, retirement, and estate strategies, ATS partners with clients and their families to align wealth with their values and ensure it endures for generations to come. For more information, please visit https://atswealthmanagement.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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