

# Press Kit

Integrity Marketing Group Acquires Senior Planning Center



August 30, 2022



## Integrity Expands Medicare Coverage in Northeast by Partnering with Senior Planning Center

Trusted and respected Medicare agency in Maine chooses Integrity to streamline technology and expand resources for employees, brokers and clients

**DALLAS - AUGUST 30, 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 acquired [Senior Planning Center](#), an independent marketing organization (“IMO”) based in Farmington, Maine. As part of the acquisition, Tony Arruda, Founder and CEO of Senior Planning Center, will become a Partner in Integrity, and Stephanie O’Leary will become President of Senior Planning Center. Financial terms of the acquisition were not disclosed.

“Tony, Stephanie and their team are committed to standing by their clients when it matters most,” shared Bryan W. Adams, Co-Founder and CEO of Integrity. “Oftentimes their service extends far beyond meeting a client’s insurance needs, and that dedication has helped Senior Planning Center become one of the most trusted and respected Medicare agencies in the Northeast. Integrity will support their growth by providing shared business services, world-class technology and an increasingly wide range of resources to help train and support broker agents. Senior Planning Center’s personalized approach aligns perfectly with Integrity’s mission to holistically protect the life, health and wealth of American consumers. We can’t wait to serve more seniors in the Northeast together in new and better ways than ever before.”

Nearly two decades ago, Arruda recognized the important need to assist Maine’s seniors in providing planning and guidance for their healthcare and financial future. He founded Senior Planning Center in 2012 to focus on meeting the Medicare needs of clients

throughout the state, providing support that extended from urban to rural areas. The company is now one of the leading Medicare coverage experts and distributors in the state, serving thousands of seniors annually through a broad network of walk-in service locations that also specialize in connecting seniors to community resources.

“I’ve always lived near the ocean with a nautical heritage, so I recognized it was time to strengthen my ship and grow my fleet,” explained Tony Arruda, Founder and CEO of Senior Planning Center. “The technology and marketing capabilities that Integrity offers Senior Planning Center will enhance our entire operation and help us reach more seniors in the most effective ways. I see only positive outcomes for our clients, our carriers and especially our employees. In business, I’m always looking ahead and I’m very proud that Senior Planning Center is now charting a course for exciting new destinations as an Integrity partner.”

Through Integrity’s omnichannel platform of innovative insurtech resources, Senior Planning Center can scale offerings to recruit more agents and establish a footprint in new markets. These end-to-end systems include quoting and enrollment technology, ongoing product development and Integrity’s proprietary MedicareCENTER. Integrity also offers all partners comprehensive administrative support through its shared business services, which encompass People & Culture, Technology & Innovation, legal and compliance, and access to world-class advertising and marketing.

In addition, Senior Planning Center now receives the opportunity to offer its employees meaningful company ownership through the [Integrity Employee Ownership Plan](#).

“Our goal at Senior Planning Center is to build on Tony’s compassionate model of service and continue spreading it across Maine,” said Stephanie O’Leary, President of Senior Planning Center. “Our employees and agents truly live to serve the beneficiaries they work with. Partnering with Integrity gives them access to technology and resources that are far more advanced than what we’ve been providing on our own. I can’t wait to utilize Integrity’s MedicareCENTER and pass that resource on to our independent broker partners. I’m also extremely excited to offer our employees ownership in Integrity, which will further deepen their commitment to our shared success. We have so many opportunities ahead of us, and I’m looking forward to reaching new heights in partnership with Integrity.”

Senior Planning Center joins Integrity’s partner network, a cross-industry collaboration of icons and legends who are united in their mission to innovate insurance and financial services. These leaders share best practices and strategize solutions designed to help all Americans plan for the good days ahead so they can make the most of what life brings.

For more information about Senior Planning Center’s partnership with Integrity, view a video at [www.integritymarketing.com/SeniorPlanningCenter](http://www.integritymarketing.com/SeniorPlanningCenter).

#### About Integrity Marketing Group

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 Senior Planning Center

Senior Planning Center is Maine’s leading resource providing Medicare Advantage, Medicare supplements and other related insurance products and services designed to help seniors, specifically those transitioning into retirement. Senior Planning Center represents all the major Medicare health plans. Even though they have agent partners across Maine, its walk-in service locations continue to lead in the growth of new plans and high retention rates. They strive to secure an ongoing and holistic relationship with each of its clients. The help seniors receive at Senior Planning Center is not limited to related insurance services — they also provide referral information about a wide range of resources for seniors from heating assistance to help with elder care. For more information, visit [www.seniorplanningcenter.com](http://www.seniorplanningcenter.com).

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# Bryan W. Adams

Co-Founder & CEO

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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.



# Tony Arruda

Partner



Anthony “Tony” Arruda is the Founder and CEO of Senior Planning Center and a Partner at Integrity.

Tony received an associate degree in business from Burdett College in Boston, Massachusetts. He also served in the Coast Guard Reserves. Tony was born of first-generation Portuguese immigrants who settled in the Boston area. He learned his hard work and business ethics at an early age from his father, a taxi business owner. Tony’s early career began in the retail industry, leading him to own the third largest VHS distribution company in the U.S. at the time.

In 1992, Tony transitioned to the insurance industry. As a newly licensed broker, he opened AG Arruda Insurance and Financial Services. Over the years, his business gained loyal customers and a reputation for service in the state of Maine. In 2012, Tony opened Senior Planning Center, which has grown to be a successful agency throughout Maine with offices in Farmington, Sanford, Skowhegan, Belfast and Presque Isle. He is always trying to improve options for their clients with innovative ideas and is committed to maintaining a family atmosphere throughout his business.

Tony is a proud father and grandfather. He and his companion for life, Marge, currently split their time between Maine and Florida. Together, they enjoy traveling and going on cruises.



