



Strategic Benefits Group and NANM Merge Effective January 1: New, larger entity creates enhanced team of experienced life, long-term care, disability and annuity marketing professionals to help our agents and advisors grow their individual practices

For the past 10 years, Bill Dolan of Strategic Benefits Group, Inc (SBG) and Robert Meek of NANM, LLC (NANM) have talked about finding a way for their businesses to leverage the best of each and to do business together on a larger scale. That opportunity has finally presented itself.

SBG is a full service general agency that specializes in servicing financial advisors. SBG was formed in 1996 and focused on its financial advisor niche from day one. Today, they are the leading agency for several institutional relationships within AimcoR (SBG's IMO). SBG has an experienced team of external wholesalers and a fully staffed internal sales desk.

In 2016, AimcoR inked an agreement to be the life insurance provider of choice to HD Vest Financial Services, a national financial service company. SBG was awarded Colorado as part of its territory to support HD Vest and began looking at establishing an office in the state. This is where NANM and SBG felt they could finally create the business relationship they had contemplated years earlier.

NANM's experienced New Business team and its physical location in the Denver Tech Center enabled SBG to have an opportunity for an immediate turnkey brick and mortar operation.

Effective January 1, 2017, NANM merged its New Business operations into SBG.

This merger adds to SBG's talent pool and provides local support to service new advisor relationships. It provides NANM producers and advisors access to a team of experienced life, long-term care, disability and annuity marketing professionals to help build their individual practices.

For those with an existing NANM relationship, nothing changes for you from an operational standpoint. You still have the strong case management team of Erin Enna, Carol Keliioholokai and Cathy Montoya who will continue to service your business. Pam Sands remains in house to assist with your sales needs. Additionally, the NANM commission system remains in place.

We are incredibly excited to enter into this relationship....it has been a long time in coming!

We look forward to a productive and prosperous 2017 with you!

Bill Dolan
SBG, Inc

Robert Meek
NANM, LLC