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July 18, 2019

**AmeriLife® and Brookstone Capital Management Partner to Create  
Life & Health Insurance, Investment and Retirement Planning Powerhouse**

*Combined organization to have more than \$3.5 billion in annual life, health and annuity premiums and \$2.7 billion in assets under management*

**Clearwater, Fla.** – AmeriLife Group, LLC (“AmeriLife”), a national leader in developing, marketing and distributing annuity, life and health insurance solutions, has acquired a majority interest in Brookstone Capital Management (“Brookstone”), a leading SEC-Registered Investment Advisory (RIA) firm providing fee-based asset management services, creating one of the largest independent marketing and RIA organizations in the U.S.

The combined organization will have more than \$3.5 billion in annual life, health and annuity premiums and \$2.7 billion in assets under management (AUM). Brookstone’s founder, Dean Zayed, will continue to serve as CEO of Brookstone, and he will assume responsibility as the president of AmeriLife’s new Investment Advisory Services division. Brookstone will continue to operate from its Wheaton, Ill. headquarters.

“Partnering with Dean and the Brookstone team is a major step toward AmeriLife’s strategic goal of providing full-service insurance, retirement and legacy planning services to our agents, advisors and clients,” said Scott R. Perry, CEO of AmeriLife. “Brookstone’s comprehensive investment management platform, education and training resources, and operational and marketing support enable advisors to start and grow a successful investment advisory practice. These capabilities will be tremendous assets for our thousands of insurance and annuity-based career and independent agents who are looking to expand their businesses to include investment advisory services, and for our many experienced Series-65 licensed investment advisor representatives (IARs) who will gain access to a superior platform of investment models and IAR services delivered by a top-notch fiduciary team.”

*Financial Advisor Magazine* and *Financial Times* have ranked Brookstone as one of the nation’s largest and fastest-growing RIA firms. Through a network of over 400 affiliated advisors and firms, Brookstone provides more than 24,000 pre-retirees and retirees with investment strategy and asset management services. The firm offers an open-architecture platform featuring a variety of investment managers and solutions that complement annuities and other insurance products. The portfolios managed by Brookstone are tailored to each client’s unique risk tolerance and financial goals for asset accumulation, retirement income and legacy planning.

“We are excited to welcome AmeriLife as an equity partner and believe this strategic alliance will bring tremendous value to our affiliated advisors and agents, their clients and the industry as a whole,” said

Zayed. “Brookstone was one of the first RIAs to build a fiduciary-based turnkey investment platform specifically supporting insurance-licensed retirement advisors, and now, by integrating these two leading firms into one all-inclusive platform, affiliated advisors and agents will have access to a broader set of financial strategies to more comprehensively serve their clients’ financial needs. As AmeriLife’s new Investment Advisory Services division, Brookstone will be well-positioned to work together in partnership with AmeriLife’s entire distribution system to offer advisors a broader solution set.”

### **About AmeriLife**

*AmeriLife is a national leader in developing, marketing and distributing annuity, life and health insurance solutions to enhance the lives of pre-retirees and retirees. For nearly 50 years, AmeriLife has partnered with the nation’s leading insurance carriers to provide value and quality to customers served through a national distribution network of over 140,000 insurance agents and advisors, 20 marketing organizations, and 50 insurance agency locations. Visit [www.AmeriLife.com](http://www.AmeriLife.com) and follow us on [Facebook](#), [Twitter](#) and [LinkedIn](#).*

### **About Brookstone Capital Management**

*Founded in 2006, Brookstone Capital Management (BCM) is an SEC-Registered Investment Advisory firm providing fee-based asset management services through its niche network of more than 400 financial advisors and firms. As an open-architecture Turnkey Asset Management Platform (TAMP), Brookstone offers advisors a wide array of investment strategies. Founder and CEO Dean Zayed established Brookstone with the singular goal of forging strategic relationships with independent advisors to comprehensively support all aspects of their fee-based advisory business. Visit [www.BrookstoneCM.com](http://www.BrookstoneCM.com) for more information.*