

FOR IMMEDIATE RELEASE

AmeriLife® Expands Retirement Planning Services with Acquisition of J.D. Mellberg Financial

Clearwater, Fla. – February 12, 2020 – AmeriLife Group, LLC (“AmeriLife”), the national leader in marketing and distributing life, health and retirement solutions, has acquired a majority interest in J.D. Mellberg Financial (J.D. Mellberg), a leading annuity and retirement planning organization that provides income planning and asset preservation services to pre-retirees and retirees across the country. The combined organization represents more than \$4.8 billion in annual annuity premium.

This transaction – along with the recent acquisitions of Dallas Financial Wholesalers, Brookstone Capital Management and Agent Support Group – furthers AmeriLife’s investment and retirement planning capabilities with a broad array of annuities, advanced life insurance solutions, and investment advisory services.

Founded in 2005, J.D. Mellberg helps clients develop and implement retirement income strategies. J.D. Mellberg is a seven-time *Inc. 500/5000* company, a designation earned by the country’s fastest-growing private companies. The company’s growth is driven by industry-leading, multi-media lead-generation and call center appointment-setting capabilities. This, combined with their proprietary technology platform, provides detailed analytics and matches up agents and prospects via a unique mobile sales technology tool.

Founder Joshua (“Josh”) Mellberg, along with Dan Morgan, the company’s General Counsel and Chief Compliance Officer, will continue to lead the organization from the company’s Tucson, Ariz. headquarters. Josh will also be a principal and member of the management team with AmeriLife’s annuity and retirement services division. Mellberg has been featured on CNBC, AZ-PBS and Yahoo! Finance, makes frequent public presentations on retirement income planning, and conducts training events across the country that prepare financial professionals to incorporate annuities into their clients’ tax and estate-planning strategies.

“We are excited to partner with AmeriLife – a powerhouse in the industry. AmeriLife brings us additional capabilities to support our purpose in helping clients feel more confident about their finances to achieve the retirement lifestyle they want, regardless of unforeseen circumstances,” Mellberg said. “With this new partnership, we can continue our rapid growth, while remaining dedicated to serving the needs of our clients and agents.”

“Josh is passionate about educating consumers to help them make informed choices and feel confident about their financial future,” said Scott R. Perry, CEO of AmeriLife. “He has instilled that customer-centric approach in the agents and the employees on his team. All of us at AmeriLife are looking forward to what we will accomplish together with our new partners at J.D. Mellberg.”

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About AmeriLife

AmeriLife is a national leader in developing, marketing and distributing life and health insurance, annuities and retirement planning 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 and follow AmeriLife on [Facebook](#) and [LinkedIn](#) for more information.

About J.D. Mellberg Financial

J.D. Mellberg Financial has been helping retirees and pre-retirees develop strategies tailored to their needs and goals since 2005. Based in Tucson, AZ and with a client base nationwide, J.D. Mellberg is growing in most major metropolitan areas to continue to best serve its clients. The company's growth is driven by an industry-leading, multi-media lead generation and appointment setting service, and by a superior product and mobile sales technology platform that enables insurance agents and advisors to serve more clients with better solutions. Visit www.jdmellberg.com for more information.

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