



Together, Reaching New Heights

The Leaders Group, Inc. Member FINRA/SIPC



The Premier Broker-Dealer For Life Insurance
And Annuity Producers

About

Founded in 1994, The Leaders Group, Inc. is a national, independent broker-dealer located in Littleton, Colorado. For nearly a decade, we have been the number one distributor broker-dealer in the world for variable universal life. We are also the preferred broker-dealer for life insurance producers and financial professionals nationwide — for over 25 years.

Our focus at The Leaders Group is delivering a superior level of customer service. We take pride in maintaining a high level of support, accessibility, and industry-specific knowledge to fit any business model. We offer weekly commission payouts, a smooth transition process, and a state-of-the-art technology platform.

We are family owned and are not tied to any insurance provider, marketing organization, or outside entity. We never lose sight of who makes us great, and we treat you as an extension of our family. Our knowledgeable and friendly staff is ready to support and assist you with building your business. We view our relationship as a lasting partnership and strive to be more than just a regulatory necessity.

Flexibility, expertise, stability, transparency, and ease of doing business are the cornerstones of our organizational culture at The Leaders Group. The over-arching motto, *Doing the right thing is always the right thing™* guides our business operations and decision-making.



Our mission at The Leaders Group is to deliver a superior level of support, accessibility, and industry-specific knowledge to financial professionals.

Our Cornerstone Values

FLEXIBILITY

We support your efforts to run your business independently and support a client-first mindset. We encourage our representatives to strive to their own level of success and will not impose production requirements. We afford our financial professionals the opportunity to work with almost any life insurance and annuity marketing partner they prefer. We have relationships with the leading general agents and annuity marketing organizations, if an introduction is desired.

Our Compliance department has a business-friendly philosophy and our management team is helpful and accessible across all departments. We operate a centralized OSJ structure, freeing you from the obligation of conducting oversight responsibility with other registered representatives.

TRANSPARENCY

We offer a simple cost and payout structure, complemented by an easy-to-use online business submission platform. We have a flat quarterly fee structure that is all-encompassing of our complete offering: Regulatory oversight, state-of-the-art technology platform, E&O, business processing, marketing support, and much more. Indexed annuities are required to be processed through the broker-dealer for suitability.

EXPERTISE

We are a best fit for annuity and life insurance producers, with support provided to access all major product lines of VUL, VA, EIA, mutual funds and third-party money management. For fee-based advisors, we offer custom portfolios through our Starlight Portfolios platform. The Leaders Group is a leading broker-dealer for private placement and life settlement solutions. We require attendance to our annual practice management meeting where our representatives exchange ideas, engage with our product partners, and learn from our top producers.

EASE OF DOING BUSINESS

We've built a proprietary technology system to facilitate the transfer of existing business and the submission of new business. This is done via paperless processing through our cloud-based technology system, LEADERSlink. We offer a dedicated transition team to assist you in re-papering your book of business. Our friendly, professional staff is ready to pick up the phone when you call to address any need you may have.

STABILITY

The Leaders Group has enjoyed 25 years in the business, excelling in a constantly evolving and volatile broker-dealer market. We won't be bought, sold, or merged with, as we are committed to our values which are strengthened by our independent mindset. Our reps are not a number but members of The Leaders Group family.

The President's Club & Directors Council

The President's Club is composed of the top 30 retail representatives. Every year, the President's Club votes to elect two new members to the Directors Council as two existing members complete their three-year terms. The Directors Council comprises seven total members, including one honorary member that stays on indefinitely. These members have some additional responsibilities and help guide The Leaders Group.



Bob Friedlander



Tim Gelinas



Sonny Horn



Sal Palazzolo



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