

Meritage Wealth Insurance Advisors Joins Forces with AmeriLife's Saybrus Partners

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By AmeriLife Communications

Leading life insurance general agency brings sophisticated planning expertise and broad institutional relationships to Saybrus and AmeriLife Wealth Group

HARTFORD, Conn. and CLEARWATER, Fla. – May 16, 2024 – Saybrus Partners (“Saybrus”), a market leader in life and annuity distribution and an affiliate of **AmeriLife** Group, LLC (“AmeriLife”), announced today that it has entered into a partnership with **Meritage Wealth Insurance Advisors** (“Meritage”), a point-of-sale (POS) focused, national life insurance general agency that serves financial professionals across a spectrum of life, annuity, retirement, legacy and business/executive benefits planning solutions. Per the agreement, terms of the deal were not disclosed.

“Meritage Wealth Insurance Advisors’ experience and success in the life insurance industry, sophisticated planning expertise, and strong

operational capabilities make the firm an exciting complement to our business,” said Edward W. Cassidy, managing principal of Saybrus Partners. “I’m happy to welcome Meritage’s leadership team and employees to the Saybrus family, and look forward to our work together.”

Founded in 2019 by a team of five industry veterans, Meritage has built a national reputation for expertly designed solutions and consistently exceeding expectations for the most sophisticated and complex client relationships. Among other capabilities, including point-of-sale support, Meritage’s full-service model offers access to advanced case design, deep carrier relationships and product options, and back-office and underwriting support. With over 100 years of combined experience, Meritage’s partners have built a company that is passionate about client service delivered through a high-touch, consultative approach that has helped the firm stand apart in the industry.

“We are thrilled to be joining this industry-leading organization,” said Chuck Adam, one of Meritage’s founding partners. “Not only did we immediately connect with Saybrus’ culture and team, but the company’s strong track record, robust resources and long-standing relationships make it a great strategic fit for our firm.”

Together with Saybrus, Meritage also becomes part of a fast-growing **AmeriLife Wealth Group**, a new kind of wealth distribution platform that aims to deliver a suite of best-in-class services to the

modern agent and financial professional to ensure their clients – no matter their stage of life – never outgrow them.

“Meritage brings all the components we look for in new wealth distribution partners and we’re thrilled to welcome them to the AmeriLife family of companies,” said Mike Vietri, Chief Distribution Officer for AmeriLife Wealth Group. “Indeed, Meritage is the perfect complement to Saybrus, and I have no doubt that – with the support of Ed and his team – Meritage will take an already stellar track record of growth and success to new heights.”

Under Saybrus, the firm will continue to operate as a standalone company from its Cypress, Texas headquarters, led by its five founding partners who will report to Cassidy.