

EPIC Expands Life and Executive Benefits Platform

Strategic acquisition aligns with EPIC's growth objectives, significantly enhancing its competitive advantage and presence in the advanced planning and life insurance market.

EPIC has acquired TDC Life ("TDC"), an Ohio-based life insurance and estate planning firm. This strategic partnership will bring TDC under the Vanbridge Life & Executive Benefits ("[Vanbridge](#)") umbrella and significantly enhance EPIC's market presence in the life insurance industry.

With a legacy dating back to 1958, TDC has a rich history of excellence in life insurance. Under the visionary leadership of Cleves Delp, TDC has set the standard among independent life insurance agencies by embracing sophisticated wealth preservation strategies while demonstrating a never-ending commitment to putting clients first.

"Our unwavering focus on client needs and innovative wealth preservation strategies has positioned TDC as a leader in the industry. We are excited to join Vanbridge, a company that shares our legacy of trust and innovation. With our shared vision and commitment to excellence, we will continue to redefine the standards of the life insurance industry," said Cleves Delp, Founder of TDC.

TDC works with a national network of advisors, including investment advisors, attorneys, CPAs, and business managers for athletes and entertainers, to provide best-in-class services for their clients' complex wealth preservation strategies. TDC's expertise transcends traditional insurance planning, catering to the unique needs of wealthy individuals, families, and business owners. Waller Helms Advisors acted as exclusive financial advisor to TDC for the acquisition.

"Our team is thrilled about the opportunities ahead with Vanbridge and EPIC. Enhancing experiences for our colleagues and clients remains a priority, and this partnership offers meaningful opportunities for our businesses and teams alike," said Tyler Horning, Principal of TDC Life. "By further collaborating with experts in the specialty practices across EPIC, we are able to expand our portfolio of products and services exponentially, providing even greater value and support to our clients."

"This acquisition marks a pivotal milestone for Vanbridge. Tyler and Cleves bring top-tier professionalism and expertise that will help take our platform to the next level. With our depth and scale, we are thoughtfully positioned to continue leading the independent life insurance and executive benefits advisory markets," said Mitchell K. Smith, Managing Principal of Vanbridge and Co-President of EPIC Life and Executive Benefits. "We are proud they chose EPIC."

"TDC has a long-standing reputation for excellence in life insurance and estate planning solutions, and their client-centric approach aligns with our vision of providing unparalleled service and innovative insurance solutions," said Tom Bellig, Managing Principal of Vanbridge and Co-President of EPIC Life and Executive Benefits. "We are excited to welcome the team at TDC to the Vanbridge organization."

About Vanbridge Life and Executive Benefits

Vanbridge's Life and Executive Benefits division provides coordinated advice about insurance planning, executive benefits, estate, tax, distributions, business succession, and other related financial matters. Our clients rely on our team to identify relevant areas of risk, ask clarifying and exploratory questions to identify goals, generate custom solutions and manage the implementation in conjunction with their legal and tax advisors, when applicable.

Vanbridge's infrastructure, services, and strategies cater to RIAs, Family Offices, CPA firms and financial service professionals. We have assembled a distinguished interdisciplinary team that combines the best in life and annuity, capital markets, tax, and legal expertise. A true independent firm with offices and leadership across the country, Vanbridge provides objective access to the world's leading carriers across life insurance, annuities, disability income, long-term care, and linked benefits. Visit: www.vanbridge.com.

About TDC Life

With a legacy dating back to 1958, TDC Life is a leading independent broker of high-end life insurance. Our sophisticated wealth transfer solutions are tailored to the unique and complex needs of affluent families and their advisors. We're redefining the life insurance experience by doing what's right, what's needed, and what's best for our clients as their trusted partners for life www.tdclife.com.