INTEGRITY WEALTH

Integrity Wealth Overview

2026

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REV 02.2026

Wealth Platform Overview

Integrity has invested two years and over $15 million into building a revolutionary new Holistic Wealth Management Platform.

$55 Billion
Assets Under Management & Advisement

200,000+
Client Accounts

1200+
Financial Advisors

As of 11/01/2025

Multi-Affiliation Model

INTEGRITY
WEALTH®

Integrity Alliance	Integrity Advisory Solutions	Integrity Financial	Integrity Capital	Integrity Retirement Plan Services
Corporate RIA & Broker-Dealer	*Fee-Only RIA*	*Hybrid RIA*	*Limited Broker-Dealer*	*Wealth Services*

A Flexible Platform Built Around You

Our goal is to meet advisors where they are and give them control, choice, guidance and support based on their specific needs. We offer:

- Multi-affiliation & multi-custodian
- Comprehensive wealth management services
- Onboarding & training
- Ungated access to products and solutions
- Transition assistance & potential higher payout

Advisors We Serve

Our omni-channel affiliation models allow us to recruit and service any type of advisor.

- Wire House, Independent BDs, etc.
- Independent Advisors (CPAs, RIAs, Attorneys)
- Insurance Agents with Securities License
- Interested Insurance Agents w/o Securities License
- Retirement Plan-Focused Agents / Advisors
- Institutions (Banks,TPMs, etc.)

Custodian Relationships

The expansive Integrity Wealth product offerings and custodian relationships our partners provide allows advisors to choose what suits their client's needs, so they don't have to compromise their goals.

Custodian	Corp RIA / BD	Fee Only RIA	Hybrid RIA
BNY MELLON | PERSHING	✓	✓	✓
Fidelity®	✓	✓	✓
charles SCHWAB	✓	✓	✓
LPL Financial			✓
Goldman Sachs	✓	✓	✓

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Products and Solutions

With Integrity Wealth, your access to products and solutions is ungated, helping you make decisions for your clients' short- and long-term objectives. We offer you access to:

- Broad portfolio, advisory program and TAMP options
- Comprehensive Mutual Funds/ETFs, Variable Life/Annuities, REITs/BDCs, and other alternative products including Integrity Wealth Alternatives (iCapital)
- Third party and proprietary model portfolio options, including Wealth Solutions and Retirement Ally portfolios, plus HiS models by Brian Belski
- Indexed Annuities can be managed outside of the grid

Integrity Wealth Alternatives

Integrity Wealth has partnered with iCapital to offer you access to alternative investments and private markets through their suite of easy-to-use technology and service solutions.

Manage all your clients' new alternative investment holdings from just one alternative investment platform

Support your clients' investment goals by selecting from a curated menu of funds vetted by the seasoned iCapital Due Diligence team

Draw on educational resources designed for every level of advisor experience that address Foundational, Investment, Product and Thought Leadership topics

Access a 10-course AltsEdge™ Certificate Program to deepen your understanding of private capital markets, hedge funds, registered funds, asset allocation and portfolio construction

Enjoy an end-to-end compliance solution with education, research, automated documentation and comprehensive reporting

Exclusive HiS Equity Models

To bring you more proprietary options on the Integrity Wealth platform, we have partnered with Humilis Investment Strategies led by Brian Belkski.

The five new HiS Equity Models housed under the Retirement Ally Model Portfolio were built by Brian Belski and based on a bottoms-up fundamental analysis combined with a thematic approach, guided by principles of "conviction and humility."

- U.S. Dividend Growth
- U.S. Large Cao Fundamental Value
- U.S. All Cap
- U.S. SMID Focused
- U.S. Focused Opportunities

INTEGRITY
WEALTH
+
HiS HUMILIS INVESTMENT STRATEGIES

Technology & Integrations

Our powerful technology platforms and integrations are built to help make your day-to-day practice, client and wealth management tasks more streamlined and efficient. Which means you can spend less time managing your business and more time growing it. Integrations include:

- Integrity Wealth Advisor portal with third party platform integrations
- Integrity Wealth Black Diamond
- SS&C Salentica & RCI

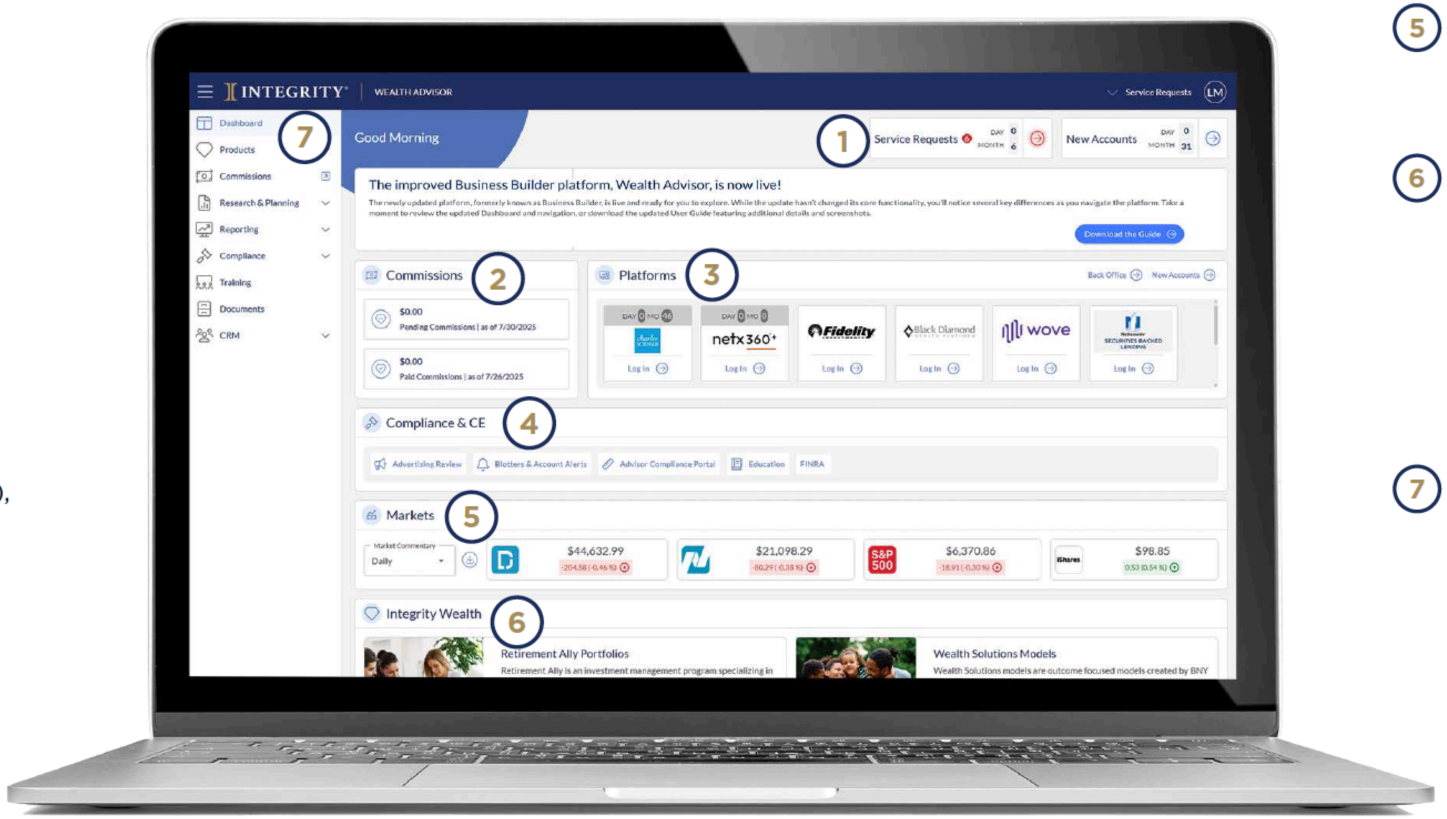
Integrity Wealth Advisor Portal

1 **Company Alerts**
Access Service Requests & New Account Alerts

2 **Commissions**
Commissions information (if applicable) is available here

3 **Platforms**
Includes SSO capabilities for Back Office (Nexus), New Accounts (Docupace), Schwab, Pershing (Netx360), Fidelity, Black Diamond, Wove, Nationwide SBL and iCapital Alternative Investments. Schwab and Pershing access tiles also include Alerts

4 **Compliance & CE:**
SSO or direct links for Advertising Review (Red Oak), Blotters & Account Alerts (RCI), Advisor Compliance Portal (RCI), Education (Quest CE) and FINRA



5 **Markets**
Includes Stock Tickers & Market Commentary

6 **Integrity Wealth Portfolios**
Learn more about our Integrity Wealth proprietary investment models, including Retirement Ally, Wealth Solutions and Wealth Solutions SMA

7 **Menu & Navigation**
Further explore the menu to find Research & Planning tools like Nitrogen and Albridge, compliance and procedure documents and forms, training videos and more

Black Diamond Advisor & Client Dashboards

We offer robust technology designed to help you work smarter, including:

- Advisor configurable dashboard includes consolidated reporting across client accounts and product types and allows you to:
  - Manage client account openings and create client portals
  - Proactively monitor you book of business and detect anomalies
  - Manage risks due to portfolio drift, cash requirements or tax scenarios

- Client dashboard offers clients a personalized view of their financial picture, including:
  - 24/7 access to financial plans, reports and secure documents
  - Comprehensive overview of asset location, performance metrics and net worth
  - Track investment performance over different time frames, including gains, losses and returns

Onboarding Support & Planning

Our team is committed to giving you the tailored support you need to be successful, from recruiting to onboarding and beyond.

- Transition support includes a personalized transition plan, live and on-demand trainings, assistance with paperwork and transferring client accounts, licensing approvals and more
- Ongoing support starts once your transition is complete and includes live answered phone calls during business hours, fast turnaround on advertising review, individualized case support and consultations, Black Diamond support team and more

Transition Support

With Integrity Wealth you can manage your business for as long as you like and when you are ready to transition out of your practice, we can provide the transition support you need, including:

- Business valuation
- Deal structure
- Appealing multiples and terms

Holistic Solutions

Access Wealth Management, Annuities, Life and Health Solution – all from one partner you already know.

Firm type	Life	Health	Wealth	Multi-affiliation	Multi-custodian
Integrity Wealth	●	●	●	●	●
Wire House, Independent BD’s, LPL, etc.	◐		●		
Independent Advisors (CPAs, RIA, Attorneys)	◐		●		◐
Insurance-based Marketing Organizations	●	●	◐		
Retirement Plan-Focused Agents/Advisors (401k Administrators)			◐		
Financial Institutions	●		●		◐

Why Integrity Wealth?

Comprehensive

Integrity Wealth offerings are comprehensive, offering a variety of advisory programs, TAMPs, custodians, mutual funds / ETFs, annuities and more to help meet the specific needs of their clients.

Supportive

Each model offers access to channel-specific expertise from industry leaders, with advisors accessing technology and as much or as little support as needed to manage their business.

Flexible

The Integrity Wealth platform is configurable to different advisor types, allowing advisors to select their model and custodian to grow their business “their way”.

Scale

Integrity Wealth offers a large network and structure to drive the growth of each advisors’ business, with the ability to offer holistic planning and help mitigating compliance and risk-related challenges.

Kaplan Securities Licensing Exam Prep

Integrity Wealth's partnership with Kaplan allows prospective advisors to:

- Access discounted pricing on Kaplan's Securities License education
- Study for your SIE, Series 6, Series 7, Series 24, Series 63, Series 65, Series 66 and more!
- Use Kaplan's easy to use platform, schedule and study tools to elevate your opportunity to pass securities exams
- Expand your business into the wealth management space