



Pensionmark and Lion Street Announce Partnership

FOR IMMEDIATE RELEASE

AUSTIN, TX – April 13, 2021 – Pensionmark Financial Group and Lion Street, Inc have entered a partnership focused on providing life insurance services and solutions to the clients of Pensionmark advisors. Pensionmark is an industry leading national network of advisors that provides retirement solutions to its clients. Lion Street provides elite life insurance advisors access to the financial products, intellectual capital and specialized resources they need to meet the sophisticated needs of high-net-worth, high-income and business clients.

In this partnership, Pensionmark’s network of over 300 advisors in 65 locations with over 3,000 clients will have access to the products and services of Lion Street and will have the opportunity to partner with Lion Street Private Client Group in the institutional space.

“This partnership connects two of the most successful distribution networks in their industries in their areas of complementary expertise: qualified retirement plans and life insurance solutions,” stated Dan Byrne CEO of Pensionmark Insurance. “We can provide better outcomes for clients – independent advice, superior product, integrated solutions and world-class client service.”

“Advisors focused on qualified retirement plans were once very distinct from advisors that provide insurance-based solutions,” says Mike Woods, President of Pensionmark Financial. “As their role has evolved, it has become critical for today’s professional advisor to have access to all solutions. This is an evolution that will continue to accelerate as trusted Pensionmark advisors are increasingly called upon to help clients solve post retirement challenges as well.”

“Lion Street is excited about this new affiliation with Pensionmark,” says Bob Carter, Founder and CEO of Lion Street. “Having the opportunity to align Lion Street and our institutional platform with qualified plan advisors that share our core principles of independence and open architecture is a win for both organizations and our clients.”

About Lion Street

Lion Street is a leading financial services company based in Austin, Texas. Lion Street provides its elite network of Firms and financial professionals access to the financial products, intellectual capital, and specialized resources they need to meet the sophisticated needs of high-net-worth and corporate clients. Together, Lion Street’s Owners are strongly committed to building a highly collaborative network of professionals. To learn more about Lion Street, please visit www.lionstreet.com or connect with us on [LinkedIn](#).

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About Pensionmark Financial Group

The Pensionmark Financial Group network represents over 300 advisors and staff across 65 locations across the country with over 3,000 retirement plan clients. The Pensionmark' network of retirement specialists includes defined contribution, defined benefit and terminal funding, not-for-profit, wealth management, and executive/deferred compensation specialists. As of December 31, 2019, the Pensionmark network of advisors and firms collectively provides support to over \$48 billion in assets across a variety of channels including investment management and retirement plan consulting services. This includes regulatory assets under management (AUM) of over \$19 billion. To learn more about Pensionmark, please contact Renata Coimbra, Director of Marketing Communications at renata.coimbra@pensionmark.com, or visit <https://pensionmark.com/>.