



PRESS RELEASE

DALLAS, TX - NOVEMBER 2025

Lion Street successfully hosted their first Next Gen Sales Academy meeting this past week in Dallas, TX. Created in partnership with Nationwide and Red Flag Advantage, this event brought together insurance professionals from across the Lion Street network to educate and support the next generation of advisors.

"This initiative was a success in addressing the growing need for professional development of the next generation of advisors in our industry," said James Joyce, Lion Street's Chief Revenue Officer. **"With over 800 financial professionals within Lion Street's network of Firms, we look forward to this program being core to helping these individuals be fully equipped to serve high-net-worth and corporate clients, while efficiently scaling their respective businesses."**

The Next Gen Sales Academy was an immersive training experience equipping advisors with the tools, skills, and structure necessary to perform at their full potential. Young advisors were able to utilize Red Flag Advantage's Sales Operating System™ and Compass Framework™ to refine their sales process, deepen client relationships, and cultivate the discipline required to achieve sustained success.

"Most firms today are overly dependent on the founder or their most senior advisors," said Chuck Hollander, Founder of Red Flag Advantage. **"The Academy gives the next generation the training and critical skills to build clientele in an ever-changing, increasingly competitive environment. Without a repeatable sales methodology, it's nearly impossible for the next generation to build a healthy, sustainable advisory firm."**

Lion Street partnership carrier Nationwide, is proud to support this initiative and offered insights on the academy's impact. **"This collaboration reflects our shared commitment to investing in the future of the industry by equipping advisors with the tools and confidence they need to succeed,"** said Alisha Zaayer, Nationwide's Divisional Vice President of Producer Group Sales. **"Together, we're building a foundation for long-term growth, strengthening the talent that will lead our businesses forward for years to come."**

ABOUT LION STREET

Lion Street is a leading financial services company based in Austin, Texas. Lion Street provides its elite network of independent Firms and financial planning experts access to the financial products, intellectual capital, and specialized resources they need to meet the sophisticated needs of high-net-worth and corporate clients. To learn more about Lion Street, please visit www.lionstreet.com, hear directly from other Firm-Owners, or connect on LinkedIn.

ABOUT RED FLAG ADVANTAGE

Red Flag is a boutique sales performance consulting and training firm that helps life insurance and financial services organizations better understand sales performance—where it comes from, what disrupts it, and what levers to pull to predictably influence it. Red Flag's Sales Operating System™ and Compass Framework™ are trusted by some of the most successful and admired advisory firms in the country.

ABOUT NATIONWIDE

Nationwide, a Fortune 100 company, is one of the largest and strongest diversified insurance and financial services organizations in the United States, committed to protecting people, businesses, and futures with extraordinary care.