

PRESS RELEASE

LION STREET HOSTS G1/G2 RETREAT SUPPORTING MULTIGENERATIONAL LEADERSHIP ACROSS FIRM NETWORK

HORSESHOE BAY, TEXAS - APRIL 2026

Lion Street convened multigenerational firms from across its national network for a G1/G2 Retreat, designed to support continuity for these practices. The retreat was sponsored and co-hosted by Pacific Life, reinforcing a shared commitment to empowering the future of independent distribution through next-generation development.

The retreat centered on three themes: **Beginnings, Growth, and Transitions**, creating space for candid conversations around early lessons learned, strategies for sustaining momentum, and insights for preparing a G2 successor. Participants also explored how prospecting and sales continue to change across generations and how to preserve the strengths of relationship-driven practices.

“A significant number of life insurance practices are preparing their next generation. An important question they face is, how to leverage their combined experiences for the future?” said Bob Carter, Founder and CEO of Lion Street. **“This retreat reflects our commitment to supporting the 40+ G1/G2 Lion Street Firms. We are the only producer group with a program and resources dedicated to positioning the next generation to build on the legacy of those who came before them while adapting to the future of the profession.”**

Lion Street partnership carrier, Pacific Life, reinforces these values in strengthening the multigenerational firms across Lion Street’s national network.

“Lion Street has a growing community of G1/G2 practices that are actively preparing the next generation to become the successor of the business,” said Kevin Kennedy, Chief Sales and Marketing Officer at Pacific Life. **“Supporting these esteemed multigenerational practices is crucial, not only for the long-term success of the firms themselves but ultimately the families and businesses for whom they create solutions.”**

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.

ABOUT PACIFIC LIFE

For more than 150 years, Pacific Life has helped individuals, families, and businesses build financial security and protect what matters most through a range of life insurance, annuities, and investment solutions. Pacific Life is committed to supporting financial professionals with innovative products, advanced planning expertise, and practice-development resources that help them deliver meaningful protection and legacy outcomes for the clients they serve. Learn more at www.pacificlife.com.