



M Financial Group™

Fact Sheet

Profile

With more than 145 Member Firms in 40 states, Hong Kong, United Arab Emirates, and the United Kingdom, M Financial Group is one of the nation's leading financial services design and distribution companies.

Since 1978, M Financial's network of independent insurance, investment, and executive benefit firms has served the needs of ultra-affluent individuals, corporate executives, successful entrepreneurs, and *Fortune 1000* companies.

Performance

In 2017, M Member Firms produced \$1.7 billion in sales and M Financial's revenue totaled \$851 million, the second highest sales year in its history.

Currently, Member Firms have approximately \$154 billion of face value in force and manage client assets in excess of \$41 billion.

Since 1996, M Financial's compound annual growth rate for sales is 10%.

Innovation | Excellence | Leadership | Collaboration | Advocacy

Services

M Member Firms are recognized leaders in the wealth transfer, executive benefits, and wealth management markets. Through long-term relationships with major product manufacturers, and the expertise of more than 145 leading independent financial services firms, Member Firms are uniquely positioned to deliver customized insurance, benefits, and investment solutions designed for the complex needs of their clients.

M Financial was founded on the principle that "off-the-shelf" products often do not meet the needs of the ultra-affluent and corporate markets. For more than 35 years, M Financial has worked closely with leading insurance carriers and investment firms to pioneer the industry's most innovative solutions. Access to ultra-affluent experience data, combined with collective buying power, translates into the ability to create proprietary solutions available exclusively to Member Firm clients.

In addition, M Holdings Securities, Inc., M's full service Broker/Dealer, and M Wealth, M Financial's wealth management division, provide Member Firms with access to a wide variety of investment products and services.

M Financial Re, a life reinsurance company owned by M Financial Stockholders, reinsures a large percentage of the business Member Firms write, providing an equity stake in their business. M Financial Re also aligns the interests of producers and carriers for quality business and facilitates strong relationships between Partner Carriers and M Financial. M Financial Re is a subsidiary of M Financial.

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Securities and Investment Advisory Services offered through M Holdings Securities, Inc., a Registered Broker/Dealer and Investment Adviser. Member FINRA/SIPC. M Financial Group is independently owned and operated.