Simplicity San Diego Transition FAQ

SIMPLICITY SAN DIEGO

What changes can I expect now that LifePro is part of Simplicity?

LifePro became a Simplicity Company in 2022. Since then, we have expanded sales training opportunities, access to proprietary products, turnkey workshops, and more. As we approach our full integration with Simplicity, our website, logo, and other assets will transition to our new title, "Simplicity San Diego." The team remains the same as we continue to meet the needs of our advisor clients, equipping them with industry-leading consumer accumulation and protection strategies.

Will contact information change?

Our phone numbers will remain the same; however, the team will soon have new email addresses. That means all outbound communications from our office will come from the simplicitygroup.com address, and all incoming messages to the previous LifePro address will redirect to the new inbox. Although we will still receive your emails if sent to the LifePro.com address, we strongly recommend you update your contact list to prevent erroneous spam flagging. See below for an updated directory.

Will there be a new website?

Our website remains the same (including the URL) but with new "Simplicity San Diego" branding.

Can I still access MyLifePro's CRM?

Yes. Your existing username and password from the LifePro website will still work to access your CRM account. Additional resources will be available to help you maximize business efficiency.

Am I still going to work with my FSR?

Yes. However, your Field Support Representative (FSR) will now be referred to as your Advisor Development Consultant (ADC).

One of the many benefits of joining Simplicity is the expansion of training opportunities for our advisors and team. Your ADC has already attended some industry-leading training courses and is incorporating those insights to serve you better.

Who runs the office now?

Dave Julian, a 19-year team veteran, will manage the San Diego office's daily operations as Heather Ulz and Ben Nevejans spearhead their expanded roles within the Simplicity Group. The broader Simplicity organization will provide additional resources as and when needed.

Why did LifePro join Simplicity?

LifePro has a long history of working with Simplicity and many members of the leadership team. We joined forces with Simplicity to accelerate growth, support, and products to better serve agents and advisors nationwide.

How is this beneficial to agent/advisor partners?

Simplicity was established to create the premier financial products distribution business in the country, and the best marketing, sales, and operations staff were built to do so. A partnership with Simplicity means our company now has access to a wide range of tools and resources, allowing us to focus on and serve our agent/advisor partners even better.

What new tools and resources are available to me?

As a Simplicity partner, you can access additional resources, including proven marketing programs, proprietary insurance products, innovative sales tools, lead-generation tools, forward-thinking training, recruiting opportunities, and more.

Expanded carriers, proprietary products, such as the Topsider Annuity from Oceanview, industry-leading technology like LifeLinkTM, a state-of-the-art video recording studio, and turnkey programs like Tax Diversification and Retirement are just some of the new resources available to help you grow.