

Shaping SFG's Next Chapter: New Leadership Roles to Drive Growth



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Sammons Financial Group has achieved so much in 2025, and we are excited about our plans for innovation and growth in the year ahead. Our \$40 Billion by 2030 initiative is bold and, as we move forward to attaining our vision, it is time to strategically shift and further shape our leadership team.



I am pleased to announce that **Rob TeKolste** will take on the new role of **President, Sammons Financial Group**, reporting to me. This new structure will allow us to continue to grow our core businesses while identifying future opportunities. This important role is designed to shepherd the next critical phase of business unit growth. Rob will do so through a strategy centered on growing the core business lines while simultaneously investigating diversification opportunities in new areas.



Additionally, **Brian Hansen** will transition from his role as Senior Vice President & Chief Development Officer at SFG to assume a new position within **Sammons Enterprises**. We are excited and proud of Brian's success, and information about this specific change will be shared by SEI later this morning.

Rob's move into his new role as SFG president is critical to shaping our future. As SFG president, he will oversee the five core **SFG business units**. Effective January 1, 2026, the **Life Insurance Group, Sammons Independent Annuity Group, Sammons Institutional Group, Corporate Markets**, and now **Sammons Wealth Management** – as well as **Corporate**

Development and **SFG Operations** – will all directly report to Rob. The development of Sammons Wealth Management as a new core business unit has been of particular focus throughout this year. We will share more information about this new business unit in the coming weeks.

I will continue to serve as Chairman and CEO of Sammons Financial Group guiding the company forward during this important phase. **Corporate Services, Investment Management, and Legal & Compliance** will continue to report to me.

That's the big picture. Obviously, this move comes with a few additional changes for our business unit leadership. I am equally excited to share those changes, which include:



Wealth Management: As we focus on growing the wealth management vertical, **Mike Mock** is promoted to **President, Sammons Wealth Management Group**. This is a key step to build Sammons Wealth Management as a pillar of SFG's overall core offerings. In this expanded leadership role, Mike will oversee the strategic direction and operations of Beacon Capital Management, NorthRock Partners, and Wealthcare.



Corporate Development: As Brian transitions to SEI, **Brent Mardis** is promoted to **Senior Vice President & Chief Development Officer**. Brent and the Corporate Development team will continue to investigate, define, and develop critical opportunities to help us create opportunities for our core businesses and diversify into adjacent financial spaces and new businesses. Reporting to Rob, Brent will also continue to lead SFG Bermuda team members.



Sammons Independent Annuity Group: As Rob moves into his new role, **Bryce Biklen** is promoted to **President, Sammons Independent Annuity Group** and will report to Rob. As president, Bryce will continue to drive SIAG's strategic priorities with a focus to accelerate growth and further strengthen our annuity market position. The SIAG leadership team will report to Bryce, and he will work to backfill his prior role as Chief Distribution Officer. Bryce will keep you up to date on changes to SIAG in the weeks ahead.

These promotions take effect on January 1, 2026, and reflect the continued growth – and investment in – our SFG leadership team. It also recognizes the valuable contributions Mike, Brent, and Bryce have made in their roles and SFG tenure.

While leadership is shifting, our purpose and foundation is unchanged.

Our core strategy – driving sustainable growth and delivering exceptional value for our customers, distribution partners, and employee-owners – remains solid and in full view. The SFG values guiding our decisions and shaping our culture still anchor us. As an employee-owned company, our success is shared, and each of us plays a role to shape all that lies ahead. Our priorities toward \$40 Billion by 2030 remain on track, and this transition will build upon our strengths, talent, and preparation for our next chapter of growth...together.

Please join me in congratulating each leader as they assume these new responsibilities. I have full confidence in their ability to succeed in their new roles and continue to have a strong, positive impact on our SFG team.

Esfand Dinshaw
Chairman & CEO
Sammons Financial Group