

Annexus Team Bios & Quotes

TEAM BIOS



Ron Shurts Co-Founder

Recognized throughout the industry as an entrepreneur and visionary leader, Annexus Co-Founder Ron Shurts has more than 27 years of financial services experience with a background in sales and management. His innovative distribution and marketing strategies have helped revolutionize the independent financial services wholesale sector. Ron is also founder of the Quantum Group, which posted sales in the retirement sector in excess of \$2 billion over the last five years. Ron is majority owner and CEO of the Arizona Rattlers, a Phoenix-based member of the professional Indoor Football League, and is actively involved with Big Brothers Big Sisters of Central Arizona and the Phoenix Suns Charities.



Don Dady Co-Founder

Over the course of more than 26 years in the financial services industry, Annexus Co-Founder Don Dady's product designs have generated more than \$28 billion in sales. He's leveraged his considerable sales, marketing and product architecture experience to build Annexus into one of the most successful and respected independent product development and distribution companies in the country. Today, he is focused on expanding the industry by applying innovation in the development of next-generation insurance and investment products that help Americans secure their financial futures and become more retirement-ready. Don is actively involved with the Phoenix Suns Charities and Habitat for Humanity.



RON SHURTS QUOTES

"Strategic partnerships are the strength and foundation of the Annexus model. This opportunity brings two world-class teams together who share a vision of revolutionizing the insured retirement market with disruptive technologies and innovative solutions."

Title: *Blackstone Makes Strategic Investment in Annexus*

Publication: [PR Newswire](#)

"It's truly remarkable when you consider the evolution and success of the FIA products we've developed since Athene and Annexus entered into a strategic partnership 15 years ago. These latest index enhancements reflect our organizations' shared commitment to helping financial professionals better serve their clients' needs."

Title: *Athene and Annexus Announce Expanded Index Lineup*

Publication: [PR Newswire](#)

"The partnership between Nationwide and Annexus continues both of our companies' traditions of designing protection-focused products with the goal of delivering better client outcomes. DPA is the result of thousands of hours of close collaboration over the past two years to deliver a solution that meets investors' unique needs for protection, growth and flexibility."

Title: *Nationwide Announces Launch of New Nationwide Defined Protection Annuity Registered Index-Linked Annuity*

Publication: [PR Newswire](#)

"For Nationwide New Heights Select, the addition of these two new indices, bucketing strategies for greater diversification and the increase of the lifetime withdrawal percentages are significant enhancements to an already successful suite of products, providing the potential for higher annual returns and more guaranteed income."

Title: *Nationwide Announces Launch of Nationwide New Heights® Select Fixed Indexed Annuity*

Publication: [PR Newswire](#)

"We saw a critical planning opportunity for financial professionals without a viable solution in the market."

Title: *Annexus and PlanGap Partner to Offer Timely Protection For Social Security*

Publication: [PR Newswire](#)

DON DADY QUOTES

"DC plans today are designed to get participants to retirement, but they are not designed to get participants through retirement. On top of millions of Americans facing significant financial shortfalls, this structure leaves them ill-equipped to navigate through the risks they will face in retirement.

It's time to change the way Americans prepare for retirement. Retirement isn't the finish line. It's the starting point."

Title: *It's Time to Change the Conversation from Retirement Savings to Retirement Income*

Publication: [Benefits Pro](#)

"The industry has been looking at the wrong endpoint for too long. It's time to reframe retirement savings plans to retirement income plans using a new measuring stick. That measuring stick should look at what is truly in the best interest of participants. Although fees will always be a part of the due diligence process, it's time to step back and focus on income as the outcome."

Title: *It's Time to Change the Conversation from Retirement Savings to Retirement Income*

Publication: [Benefits Pro](#)

"In all fairness to the industry, before the Secure Act, in-plan income as a QDIA wasn't much of an option. Post-Secure Act, the industry needs a fresh perspective. There are various ways to efficiently introduce in-plan income integrated into a retirement portfolio. To be truly successful, today's solutions must place participants' needs first and address traditional barriers to adoption, such as prohibitive costs, overly complex solutions, the sacrifice of returns, and the loss of liquidity and access to funds. It is time for some innovation."

Title: *It's Time to Change the Conversation from Retirement Savings to Retirement Income*

Publication: [Benefits Pro](#)

"While guaranteed income is crucial for clients, advisors evaluating guaranteed income FIAs should also consider many other factors. The opportunity cost of selling a product with poor growth potential is simply too risky. It's always important to also give your clients the greatest opportunity for growth potential, to provide flexibility if their plans change and they don't choose to trigger income."

Title: *Nationwide Announces Launch of Nationwide New Heights® Select Fixed Indexed Annuity*

Publication: [PR Newswire](#)

"For many Americans, lifetime Social Security benefits represent their largest retirement asset. Benefits could be reduced by 24% in 2033. Clients insure their home, cars and other valuables in their life. We believe they will also want to protect their retirement from a reduction in Social Security benefits."

Title: *Annexus and Plan Group Partner to offer Timely Protection for Social Security*

Publication: [PR Newswire](#)