

# Associate Owners Group (AOG) Launches with 13 Strategic Partnerships, Redefining Ownership in Financial Services

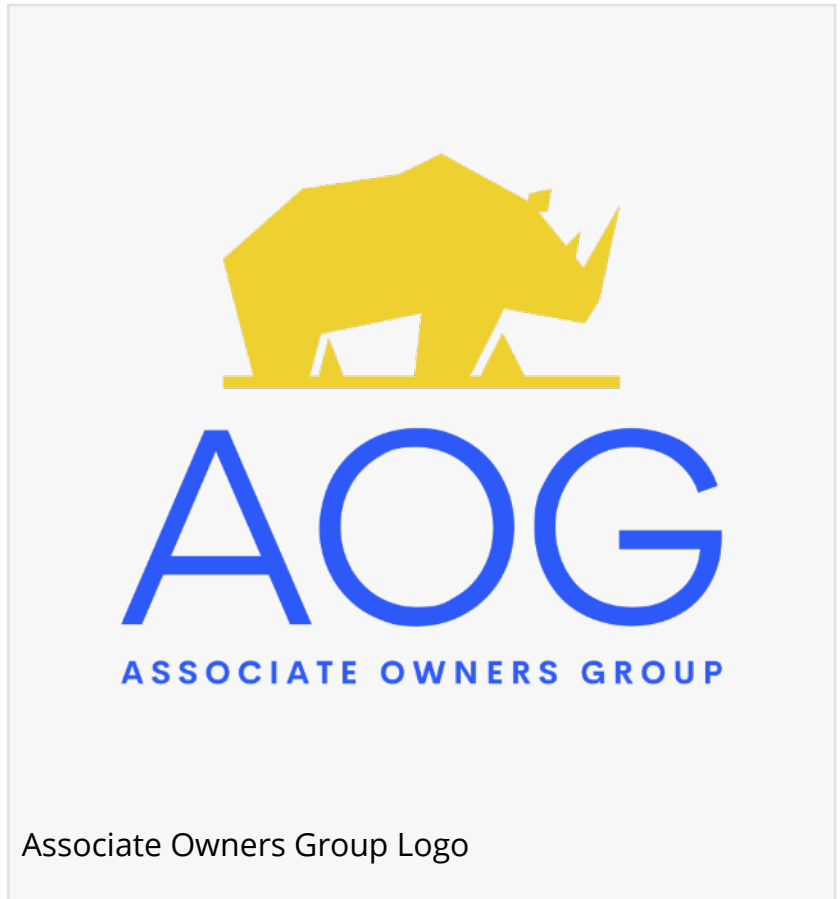
*Associate Owners Group (AOG), a Delaware corporation with a long-term goal of IPO readiness over the next three years, proudly announces its official launch.*

ST GEORGE, UT, UNITED STATES, February 10, 2026 /EINPresswire.com/ -- [Associate Owners Group](#) (AOG), a Delaware corporation with a long-term goal of IPO readiness over the next three years, proudly announces its official launch, marking a bold new chapter in financial services built on shared ownership, collaboration, and long-term value creation.

Founded on July 4, 2025 (Financial Independence Day), AOG enters the marketplace with exceptional momentum, having successfully completed 13 strategic partnerships across the financial services landscape. These partnerships represent a significant foundation for AOG's mission to unite high-performing organizations under a shared equity model designed to empower associates and drive sustainable growth.

AOG's innovative platform brings together independent firms; including insurance agencies, broker-dealers, RIAs, and strategic service partners; into a unified ecosystem that prioritizes alignment, partnership, and collective success.

"Today marks a milestone in our mission to transform the way financial professionals build their businesses," said Monte Holm, Founder of AOG. "By aligning ownership with opportunity, we are creating something truly lasting; an organization where associates share in the value they help create and where growth is achieved together."



AOG's partnership strategy has focused on organizations that strengthen the broader ecosystem and expand value for its members. With a growing footprint across key operational, technology, distribution, and service verticals, AOG is positioned to deliver unmatched support and opportunity throughout the financial services industry.

### Founding Partner Companies

During its founding year, AOG welcomed a growing group of partner organizations that now form the foundation of its expanding platform. Current companies within the Associate Owners Group ecosystem include Common Sense Financial, Your IA, AOG Tech, WellthPlan, Copper, TKT Consulting, LLC, AOG Re-Insurance, Canyon Insurance, AOG Canada, Experior Financial Group Inc., NetExit, InsurTech Hub, and Groupe Financier Signature.



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*AOG Founder & Co-CEO,  
Monte Holm*

### Leadership and Vision

Associate Owners Group is led by a distinguished executive team with deep expertise in financial services, distribution growth, and organizational leadership. The company's leadership includes Monte Holm (Founder and Co-CEO), Jamie Prickett (Co-CEO), and an accomplished executive group comprised of Jerry Vahl (Chief Operating Officer), Colby Clark (Chief Legal Officer), Mark Tichenor (Chief Financial Officer), and Colby Haupt (Chief of Staff). Together, AOG's leadership brings decades of experience building and scaling high-impact financial organizations, supporting the company's mission to transform traditional corporate equity norms into a distribution-owned equity

model.

### Key Highlights of AOG's Launch

- Founded: July 4, 2025
- Strategic Partnerships Completed: 13 companies
- Mission: To build an ownership-driven network of financial services firms aligned through

shared equity and unified growth

- Business Model: A collaborative partnership designed to empower associates, accelerate innovation, and generate long-term value

Purpose

“AOG’s purpose is to create an association, a gathering, or an alliance, if you will; of financial services marketing companies, insurance agencies, broker-dealers, registered investment advisory firms, and professionals. We plan to gather them, and we want to transform the traditional corporate equity-driven norms into a distribution-owned equity model.”

- Monte Holm, Founder of AOG

With a leadership team experienced in scaling national distribution organizations and executing strategic growth initiatives, Associate Owners Group enters the market with a clear vision: to make ownership more accessible, meaningful, and rewarding for the professionals shaping the future of financial services.

Upcoming Annual Meeting

AOG will host its first Annual Associate Owners Group Meeting in April 2026, bringing together partner companies, leadership, and associates to share strategic priorities, celebrate growth, and outline the future of the organization.

For additional details please reach out to Colby Haupt.

Why Companies Are Joining Associate Owners Group

AOG is built to deliver long-term value and strategic advantages to its partners, including:

1. Widespread equity ownership
2. Diversification of products and services
3. Pooled volume and negotiation leverage
4. Cultural and branding autonomy for affiliates
5. Industry professional and green friendly approach
6. Technology and software infusion
7. Leadership mentorship and endorsement
8. Shared administrative and operational support
9. Regional and national events that strengthen collaboration
10. International reach and expanding global scope

About Associate Owners Group (AOG)

Associate Owners Group (AOG) connects independent financial services firms through a shared equity structure, unified growth strategies, and best-in-class industry support. AOG believes the future of financial services belongs to those who own their success; building a stronger, more collaborative ecosystem where growth and ownership go hand in hand.

This announcement is for informational purposes only and does not constitute an offer to sell or a solicitation of an offer to buy securities.

Learn more at: <https://associateownersgroup.com/>

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