



Associate Owners Group (AOG) Sets the Standard for Joining Its Exclusive Family of Companies

Associate Owners Group (AOG) is proud to share what truly defines membership in its growing family of companies.

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“

We look for great leaders with great businesses, people who share our values of ownership, collaboration, and excellence.”

Monte Holm, Founder & Co-CEO of AOG

(AOG) is proud to share what truly defines membership in its growing family of companies. AOG is intentional about who it welcomes, not because the bar is out of reach, but because the right fit matters. Behind every company in the AOG ecosystem is a leader who believes that the people who build the business deserve to own it. That shared conviction is where every conversation begins.

Inspired by the Berkshire Hathaway model, but built on a grander scale and designed specifically for the financial services landscape, AOG brings together independent

companies under a shared ownership platform where founders and leaders retain full control of their businesses. AOG does not acquire companies to absorb them. It acquires them to strengthen them, support them, and give their people a stake in something bigger than any one firm could build alone.

Four Pillars. One Ecosystem.

AOG is organized around four distinct pillars of ownership. The Insurance Agency Pillar anchors the network through independent agencies. The Wealth Management Pillar extends the platform into RIAs and broker-dealers. The Technology Pillar equips the network with purpose-built financial services tools. And the Products and Services Pillar rounds out the ecosystem with E&O coverage, reinsurance, debt relief, and more. Together, the Four Pillars create a fully integrated ownership model, a true force multiplier for every leader, agent, and builder within the AOG family of companies.

Excellence Is the Entry Point.

The companies that thrive within AOG are mission-driven leaders in financial services, insurance, technology, or related fields who are committed to growth, collaboration, and professional excellence. They are not necessarily the largest companies in their market, but they are among the best, led by people of integrity who have built something real and are ready to build something greater.

"We look for great leaders with great businesses, people who share our values of ownership, collaboration, and excellence," said Monte Holm, Founder & Co-CEO of Associate Owners Group. "If that is you, there is a place for you in the AOG family."



Associate Owners Group Logo

Founders stay. Teams stay. Independence stays. What changes is access, to shared resources, aligned technology, ownership participation, and a network of companies all moving in the same direction.

If you lead a company built on integrity, driven by mission, and ready to grow within a world-class ecosystem, AOG wants to hear from you. The standard is high, and for the right leader, that is exactly the point.

To learn more or begin a conversation about joining the AOG family of companies, visit associateownersgroup.com.

About Associate Owners Group (AOG) is a collaborative ecosystem, and growing family of companies; across financial, insurance, and technology sectors, united by a shared commitment to ownership, leadership, and long-term value creation. Through strategic acquisitions and aligned vision, AOG helps companies grow stronger together while advancing financial independence for families across the US, Canada, and beyond. AOG's ownership model is designed as a force multiplier, enabling agents, builders, and leaders to participate in and benefit from the broader success of the AOG family of companies; creating long-term value through shared growth, alignment, and opportunity.

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Chief of Staff, Colby Haupt
Associate Owners Group
+1 801-738-8858

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