



Frankie McVeigh

TEAM LEAD | ADVISOR DEVELOPMENT CONSULTANT

I oversee the strategic partnership between Simplicity and GVA. As your primary point of contact for business growth and advanced case design, I ensure our specialized resources—spanning over 50 insurance companies—are fully aligned with your practice's objectives.

610-256-1318 | frankie.mcveigh@simplicitygroup.com

LIFE INSURANCE

ANNUITY

LONG TERM CARE

DISABILITY INSURANCE

ADVANCED MARKETS

THE ADVISORBOB REVENUE ADVANTAGE

All advisor commissions (excluding VUL) flow through **AdvisorBob**. This allows you to **utilize one platform for advisory, brokerage and insurance revenue**, preventing multiple carrier 1099s and consolidating to a single tax document from GVA. Simplicity is an approved General Agency for Variable Universal Life (VUL) with LPL.

GVA INTERNAL CONTACTS

INTERNAL GVA INSURANCE CONSULTANT

Kevin Rafferty

Internal contact for GVA advisors and a point-of-sale resource. For advisors with insurance opportunities who prefer not to manage the time constraints, partner with Kevin to spearhead insurance with your clients for a revenue share.

(267) 508-3451

krafferty@gvaria.com

GVA COMMISSIONS

Ivette McCartney

Commissions through AdvisorBob. Contact for commission-related questions and support.

(610) 296-7630 Ext. 104

imccartney@greatvalleyadvisors.com

SPECIALIZED SUPPORT INFRASTRUCTURE

CASE DESIGN

Ryan Kelly

Advanced case design specialist. Primary contact for pre-screen field underwriting and application support.

484-873-8504

ryan.kelly@simplicitygroup.com

PENDING CASE MGMT.

Tom O'Keefe

Pending Case Management. Oversight of requirements and carrier status updates until issue.

484-873-8509

thomas.okeefe@simplicitygroup.com

CONTRACTING

Susan Dougherty

Handles carrier appointments and ensures accurate commission flow to AdvisorBob.

484-873-8510

susan.dougherty@simplicitygroup.com

Compliance & Licensing Notes:

- Hybrid RIA/LPL advisors cannot write Fixed Index Annuities (FIA) through this channel.
- RIA Only advisors can write Fixed Index Annuities with GVA Insurance / Simplicity Group.
- Fixed Annuities are available to Hybrid RIA/LPL advisors as an LPL OBA.