

UNITED STATES DISTRICT COURT FOR THE SOUTHERN DISTRICT OF
OHIO

**Veritas Independent Partners, LLC, et al., on behalf of all others
similarly situated v. The Ohio National Life Insurance Company, et
al.**

Veritas · No. 1:18-cv-769 · Decided December 1, 2025

SUMMARY

The United States District Court for the Southern District of Ohio grants the parties' joint motion under Federal Rule of Civil Procedure 21 to drop Avantax Investment Services, Inc. as a plaintiff. Avantax's claims and related potential claims concerning ONcore annuity trail commissions are dismissed with prejudice, with each side bearing its own costs; the action continues as to Veritas Independent Partners, LLC.

OPINION

IN THE UNITED STATES DISTRICT COURT FOR THE SOUTHERN DISTRICT OF OHIO
WESTERN DIVISION VERITAS INDEPENDENT: PARTNERS, LLC, et al., on behalf of all:
others similarly situated,: Case No. 1:18-cv-769 Plaintiffs,: Judge Jeffery P. Hopkins v.: THE
OHIO NATIONAL LIFE: INSURANCE COMPANY, et al., Defendants. ORDER This matter is
before the Court on the parties' joint motion requesting an order dropping Plaintiff Avantax
Investment Services, Inc. from this action and dismissing its claims with prejudice (the "Joint
Motion") pursuant to Rule 21 of the Federal Rules of Civil Procedure.

Rule 21 provides that "[o]n motion or on its own, the court may at any time, on just terms, add or
drop a party." Fed. R. Civ. P. 21. Courts in the Sixth Circuit have decided that Rule 21 is the
appropriate "procedural vehicle for dropping fewer than all the claims or parties." *Espinosa v.*
First Advantage Background Servs., 343 F.R.D. 414, 415 (S.D. Ohio 2023) (collecting cases).

For good cause shown, the Court hereby GRANTS the Joint Motion. It is therefore ORDERED
that Avantax Investment Services, Inc. ("Avantax") is dropped from this case as a Plaintiff and
that its claims against Defendants, and any potential claims between Avantax and Defendants
related to ONcore annuity trail commissions, that could have been raised in or were raised in this
lawsuit, are hereby dismissed with prejudice.

Neither Avantax nor Defendants shall be deemed a prevailing party for any purpose and shall bear
their own costs. This Order relates to Avantax only. Nothing in the Motion seeks to impact, nor

does this Order impact, the continuing status and claims (and Defendants' defenses to the claims) of Plaintiff Veritas Independent Partners, LLC, which remains a Plaintiff in this action.

IT IS SO ORDERED. December 1, 2025 eat pepkins: United States District Judge

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