



NEWS

con·sor·tium

Latin, fellowship, from

1: an agreement, combination, or group (as of companies) *consort-*, *consors*
formed to undertake an enterprise beyond the resources of any one member

2009 FIVE STAR: Best in Client Satisfaction Wealth Managers (SM) Announced

Nine Advisors from Integrated Financial Group Named

Atlanta, GA (December 1, 2009) – Nine advisors from the Atlanta-based financial services firm of Integrated Financial Group, Amanda Fischer, David Gaynes, Karen Lee, Richard Lombardi, Stephan Oster, Donald Patrick, Denny Roodman, Al Searcy and Connie Weems-Scott, have been named in the October issue of *Atlanta Magazine*, the “2009 FIVE STAR: Best in Client Satisfaction Wealth Manager.” *Atlanta Magazine* formed a partnership with Crescendo Business Services, an independent research firm, to identify the “best in client satisfaction” wealth managers serving the Atlanta area.

The Five Star Wealth Manager Award is a recognition program for wealth managers. Wealth managers are those individuals who help you manage your financial world/and or implement aspects of your financial strategies.

In an effort to help local consumers identify the top wealth managers in their area, Crescendo Business Services, an independent research firm, surveyed, by mail and phone, 70,000 high-net worth residents in the Atlanta area and subscribers of Atlanta Magazine. They also sent 65,000 surveys to financial services industry professionals. With more than 15,000 wealth managers in the Atlanta area, the goal was to find wealth managers who successfully satisfied key client satisfaction criteria and overall scored the highest in client satisfaction. Of the 15,000 wealth managers in Atlanta, only 579 of them made this year’s list.

On the surveys, recipients were asked to evaluate only wealth managers whom they knew through personal experience on the following nine criteria: customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale service, quality of recommendations, and overall

satisfaction. Each wealth manager was reviewed for regulatory actions, civil judicial actions and customer complaints as reported by FINRA (the Financial Industry Regulatory Authority) and other regulatory agencies. The process continued as the evaluations were sent back and reviewed by a “blue ribbon panel” – comprised mainly of knowledgeable individuals within the financial services industry. The resulting individuals on the list earned the title “2009 FIVE STAR Wealth Mangers” – a distinguished group representing less than 7 percent of all professionals within a specific industry is honored with this award.

Financial professionals cannot “buy” their way onto the list, and the distinction is not based on sales volume but on how consumers evaluate their personal experience working with that individual wealth manager. This award is based on sound research methodology and comes from an independent third party which allows it to be the cornerstone of an effective marketing program to positively set apart service professionals from their competition.

The 2009 FIVE STAR wealth manager list will undoubtedly be a useful tool for these individuals to identify those advisors who have consistently earned the trust of their clients. For more information on the Five Star Award and the research/selection methodology visit fivestarprofessional.com/wmresearch.

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About Don Patrick and Integrated Financial Group

Don Patrick, Managing Director of Integrated Financial Group in Atlanta, Georgia, has been serving clients as a financial advisor for over 26 years. Patrick earned his MBA from the University of Southern California. Undergraduate studies were completed at Loyola University Los Angeles in the areas of finance and economics. He served as a pilot in the U.S. Air Force, graduating first in his class. He is also a member of the Financial Planning Association, the nation's largest organization of professionals dedicated to championing the financial planning process. He has completed additional studies and passed a rigorous certification examination and is authorized to use the CFP® mark of distinction. Integrated Financial Group, an independent financial planning consortium of advisors, delivers practical, effective financial solutions aimed at addressing the long-term financial planning needs of their clients.

For five years listeners in south Florida relied on Patrick to deliver sound, accurate financial advice as co-host of a radio talk program. He taught financial planning at Georgia State, North Metro Technical College and Gwinnett Technical College. Listed in Who's Who of Investment Management Consultants, Patrick recently authored a book titled *Keep Your Nest Egg from Cracking - What You Need to Know*. He is also a regular

contributor to numerous financial trade and consumer publications, including Wall Street Journal, Kiplinger's Retirement Report, New York Daily News, Investment News and Research magazine.

Visit www.integrated-financial-group.com for more information about Mr. Patrick and the Consortium.

NOTE: When you need a professional to speak on complicated financial topics in an easy-to-understand and lively way, please call Don Patrick or the consortium of advisors at Integrated Financial Group.

Securities offered through Securities America, Inc. Member FINRA/SIPC and advisory services offered through Securities America Advisors, Inc., an SEC Registered Investment Advisory Firm, Amanda Fischer, David Gaynes, Karen Lee, Richard Lombardi, Stephan Oster, Donald W. Patrick, Denny Roodman, Al Searcy, and Connie Weems-Scott, Representatives, Integrated Financial Group, Inc. and the Securities America companies are unaffiliated.