



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

Denny Roodman CFP®, ChFC
(314) 576-4488
denny@ifgstl.com

Local St. Louis Advisor Named 2009 FIVE STAR Wealth Manager

Denny Roodman receives top rank in client satisfaction among wealth managers in the St. Louis area

St. Louis, MO (January 16, 2009) - Following an extensive vetting process, St. Louis-based financial planner Denny Roodman - a member of the Integrated Financial Group consortium, was named "2009 FIVE STAR Wealth Manager" by *St. Louis Magazine*.

In an effort to help local consumers identify some of the top wealth managers in the area *St. Louis Magazine* recently partnered with an independent research firm and sent evaluation surveys to 43,000 high-net-worth residents in the area and also to a handful of leaders in the financial services industry. On the surveys, recipients were asked to evaluate only wealth managers whom they knew through personal experience on 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. 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 335 individuals on the list earned the title "2009 FIVE STAR Wealth Managers" - a distinguished group representing less than 3 percent of the wealth managers in the St. Louis area.

- more -

Don Patrick, Integrated Financial Group's Managing Director says, "Roodmans' client-focused, personal and dedicated process that he brings to his clients is just one of the many reasons that he truly embodies the FIVE STAR award."

Studies show that over half of the people with a net worth \$500,000 or more rely on wealth management experts. 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.

- ### -

About Denny Roodman

Denny has been providing personal financial planning since 1989. His clients use Denny and his network of tax and legal professionals, money managers, insurance other subject matter experts to help develop and implement their most important family, legal and tax planning strategies as well as wealth management, retirement planning and distribution planning.. In addition to individual consultations, Denny gives public seminars, corporate seminars and speaks to local groups on retirement planning and investment strategies. He is a CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®) which he earned after successfully completing his course of study from the College for Financial Planning in Denver, Colorado. He completed the curriculum at the Institute of Certified Fund Specialists to earn the designation Certified Fund Specialist (CFS) and holds his Charter Financial Consultant (ChFC) designation from the Board of Trustees of the American College. After completing a Master's course from the Corporation for Long-Term Care Certification, he was awarded the designation "Certified in Long-Term Care" (CLTC).

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. Roodman, 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 Denny Roodman and the consortium of advisors at Integrated Financial Group.

Securities offered through Securities America, Inc. Member NASD/SIPC. Don Patrick and Denny Roodman Registered Representatives. Advisory services are offered through Securities America Advisors, Inc., Don Patrick and Denny Roodman, Integrated Financial Group and Securities America, Inc. are not affiliated.