



Contact: Don Benson, CPA, CFP®  
Financial Advisor  
Benson Financial Services

## 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

# Local Oneonta Advisor Selected To Join Consortium of Independent Financial Planners

## *Don Benson joins the Consortium with close to 30 years of Public Accounting Experience*

ONEONTA, NY (March 1, 2008) – Following an extensive “mutual selection” process, Oneonta-based financial advisor Donald M. Benson has affiliated his financial services practice with Integrated Financial Group, a consortium of professional advisors. Donald Benson says, “This is truly an exciting day for my clients and associates as we align with the services and support of Integrated Financial Group and our broker/dealer, Securities America, Inc. (one of the nation’s most respected independent broker/dealers, member FINRA/SIPC).” Don adds, “The added ideas, innovation, and brain power that come with being part of such a group will ultimately benefit our clients.”

Don Patrick, the consortium’s Managing Director says, “The Consortium members are thrilled to have Don associate with us. He has an excellent reputation and is an elite advisor in the Oneonta area.”

When a client retains an advisor that is part of the Integrated Financial Group consortium, they can be rest assured that they are dealing with an advisor that has passed a disciplined vetting process in order join the consortium. The consortium maintains strict requirements for all advisors who are allowed to associate with Integrated Financial Group. Factors such as experience, professional designations and education, a rigorous planning process, excellent client service standards, and adherence to the consortium’s ethical guidelines are but a few.” Additionally, Patrick states, “Every advisor that wants to join

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the consortium must pass a stringent interview and vetting process with the consortium's advisory board to ensure the advisor maintains similar philosophies and a passionate commitment to our profession and their clients."

Patrick says that the consortium undergoes an extensive evaluation of every prospective advisor. They must be able to deliver leading edge advice, direction and financial planning solutions, all based on conservative, proven financial and economic principles. "Don passed our process with flying colors and will be a great addition to our consortium. He brings many years of experience, tremendous knowledge and an excellent service philosophy to his clientele."

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### **About Donald M. Benson**

Don is owner of a local CPA firm in Oneonta, New York with an office also in Suwanee, Georgia. Don is also the sole owner of Benson Financial Services.

After obtaining his BS in Accounting from Utica College of Syracuse University, Don began his career working for the State of New York as a sales tax auditor in Rochester, New York. Don's interest in becoming a CPA brought him back to his home community where he became a CPA in 1982.

Prior to opening his own firm in 2001, Don served as a Principal in a large regional CPA firm located in Upstate New York. Now with close to 30 years of public accounting experience, Don specializes in providing accounting and auditing services to small business clients including not for profit organizations, corporate taxation, personal income and estate tax planning services, assists small businesses in entity selection, fraud investigations, and financial planning services.

Upon obtaining his securities licenses, Don established Benson Financial Services in 2001. In 2006, Don obtained the credentials of CFP "Certified Financial Planner™". Accordingly, with his credentials and vast amount of experience, Don is able to offer a comprehensive range of services for individual, family, educational, retirement, estate, tax and business financial planning. Don works closely with another nearby Integrated Financial Group member, Joseph Gunter, CFP® (Norwich, New York) in serving Don's clients as well as other clients in the Chenango, Otsego and Delaware County area of Upstate New York and more recently, Suwanee, Georgia where Don spends six months out of the year.

At the local level, Don has served on various not for profits boards including the Otsego County Chamber of Commerce (New York) and The United Way of Delaware and Otsego County (New York) where in 1994, Don was designated "Volunteer of the Year". In the 1990's, Don was treasurer of a local boy scout troop and helped in establishing another Little League team in Oneonta New York for boys who did not qualify to play in other ara Little League play. Don has been a long

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standing member of The Oneonta Country Club and of Kiwanis International in Oneonta, New York. Don has recently become a new member of the Suwanee, Georgia Kiwanis club. In December 2007, Don was voted, by his local community as "The Best of the Best" for Accountants in his hometown community of Ostego County, New York.

### **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.

The Atlanta-headquartered Integrated Financial Group, one of the largest financial planning consortiums in the country with independent advisors in eight states and nearly \$1 billion in assets, delivers practical, effective financial solutions aimed at addressing the long-term financial planning needs of their clients. Over the years, Integrated Financial Group consortium has attracted some of the best and brightest financial advisors in the industry. "These are some of the most experienced and best-educated financial advisors in the profession," says Patrick.

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*.

Visit [www.integrated-financial-group.com](http://www.integrated-financial-group.com) for more information about Mr. Benson, 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 Don Benson and the consortium of advisors at Integrated Financial Group.

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