



A CONSORTIUM OF INDEPENDENT FINANCIAL PLANNERS



## 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

**Contact: Eric K. Peterson, CFP®**

Peterson Wealth Advisors

Office: (417) 884-4950

Toll Free: (866) 887-4950

Fax: (417) 897-4931

[eric@PetersonWealthAdvisors.com](mailto:eric@PetersonWealthAdvisors.com)

# Southwest Missouri Advisor Selected To Join Consortium of Independent Financial Planners

## *Eric Peterson joins the Consortium with over 20 years of Experience*

Missouri (January 13, 2009) – Following an extensive “mutual selection” process, Southwest Missouri-based financial advisor Eric Peterson has affiliated his financial services practice with Integrated Financial Group, a consortium of professional advisors. Eric Peterson 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).” Eric adds, “The added ideas, innovation, and brain power that come with being part of such a dynamic group will ultimately benefit our clients.”

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

When a client retains an advisor that is part of the Integrated Financial Group consortium, they can rest assured that they are dealing with an advisor that has passed a disciplined vetting process in order to 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 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. “Eric 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.”

## **About Eric Peterson**

Eric K. Peterson, CFP® of Peterson Wealth Advisors is an independent financial advisor serving Southwest Missouri since 1985. Eric earned his undergraduate degree from the University of Illinois in 1974 and a Bachelor's Degree in Business Administration from Augustana College in 1983. He obtained his professional designation as a Certified Financial Planner™ from the College of Financial Planning in Denver, Colorado in 1992.

A member of the financial planning industry's national organization, the Financial Planning Association (FPA), Eric stays current on retirement, investment, and planning issues through his participation in the FPA's regional chapter, the FPA of Greater Kansas City.

Eric specializes in comprehensive financial planning and wealth management by working with individuals to design personalized retirement planning, tax-advantaged investment strategies, insurance planning, and estate planning. In helping people transition from corporate life to retirement, Eric has worked with many local companies and institutions in the development, management and evaluation of their retirement plans.

"I offer balanced financial planning, using a personalized one-to-one approach to help my clients achieve their financial and life goals. I look beyond their financial picture into the realm of their most important values, relationships, and lifelong dreams. As I continue to build on the important aspects of their life, I maintain my commitment to offer informed choices that are well suited for their needs."

## **About Integrated Financial Group**

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. Peterson, 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 Eric Peterson and the consortium of advisors at Integrated Financial Group.

# # #

Securities offered through Securities America, Inc., Member FINRA/SIPC, Don Patrick and Eric Peterson, Registered Representatives. Advisory services are offered through Securities America Advisors, Inc., Don Patrick and Eric Peterson, Investment Advisor Representative, Peterson Wealth Advisors, Integrated Financial Group and Securities America are not affiliated.