



NEWS

For Immediate Release

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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

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

Seven Advisors from Integrated Financial Group Named

Atlanta, GA (October 3, 2008) - Seven advisors from the Atlanta-based financial services firm of Integrated Financial Group, Alan Evans, Amanda Fischer, David Gaynes, Richard Lombardi, Stephan Oster, Donald Patrick, and Al Searcy, have been named in the October issue of *Atlanta Magazine*, the 2008 FIVE STAR: Best in Client Satisfaction Wealth Managers (SM). *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. In February, Crescendo surveyed, by mail and phone 95,000 high-net-worth residents in the Atlanta area and subscribers of Atlanta Magazine. An additional 9,000 surveys were sent to leaders of financial service industry companies.

On the surveys, recipients were asked to select only wealth managers whom they knew through personal experience, and to evaluate them based upon 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.

By March, stacks of surveys had arrived and Crescendo began carefully scoring each wealth manager. Both positive and negative evaluations were included in the scoring. Only wealth managers with five years of experience in the financial services industry were considered.

Next, 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.

Then, before finalizing the list, wealth managers were reviewed by a blue-ribbon panel. The blue-ribbon panel was comprised of knowledgeable individuals from within the financial services industry. Although panelist comments were incorporated into the final score, safeguards were built into the review process to reduce the ability of panel members to influence the composition of the final list on the basis of company affiliation.

The resulting list of 2008 FIVE STAR Wealth Managers is an elite group, representing less than 3 percent of the wealth managers in the Atlanta area. Only 376 of the top-scoring wealth managers made this year's list. We hope this list serves as a referral network for the 368,000 readers of *Atlanta Magazine*. Is this list exhaustive? Of course not. There are undoubtedly many other excellent wealth managers who, for one reason or another, are not on this year's list.

RESEARCH DECLARATIONS:

As with any research or recognition program, it is important that we provide you the following declarations:

- The 2008 FIVE STAR Wealth Managers do not pay a fee to be included in the research or the final list of FIVE STAR Best in the Client Satisfaction Wealth Managers.
- The overall evaluation score of a wealth manager reflects an average of all respondents and may not be representative of any one client's evaluation.
- The FIVE STAR Award is not indicative of the wealth manager's future performance.
- The inclusion of a wealth manager on the FIVE STAR Wealth Manager list should not be construed as an endorsement of the wealth manager by Crescendo Business Services or *Atlanta Magazine*.
- Working with a FIVE STAR Wealth Manager or any wealth manager is no guarantee as to the future investment success nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Crescendo in the future.
- For more information on the FIVE STAR Award and the research/selection methodology, go to: www.fivestarpromotional.com/wmresearch.

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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. As independent advisors, as opposed to captive, they have access to an extensive selection of products, services and programs. The cadre of elite financial advisors each independently owns his or her own financial planning practice, and each retains a unique style and special area of planning expertise.

Visit www.integrated-financial-group.com for more information about the consortium of financial advisors.

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

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