INTEGRATED FINANCIAL GROUP
A CONSORTIUM OF INDEPENDENT FINANCIAL PLANNERS


Larry Jacobs, CFS

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

Jacobs Wealth Management Enhances Customer Service Offerings

Local Financial Planning Firm Seeks New Ways to Help Ensure Clients Have Income for Life

Bridge City, TX (May 7, 2008) – Managing Director Larry Jacobs and Associate Advisor Heath DeMarcy, both of Jacobs Wealth Management (part of the Integrated Financial Group consortium) recently travelled near Atlanta, Georgia to attend a two-day advanced BetaVest software training. The training went beyond the basics of operations, and delved into such topics as why the software was created, and how to market its use to clients.

BetaVest software is a powerful tool for teaching clients the realities of investing and letting them choose their own probability for success in a world of unknowns. Using historical data, the software predicts the success or failure of individual retirement plans. The software can also look at an individual's plan on a yearly basis and will take into account current market conditions to make adjustments or recommendations if necessary. Don Patrick, Managing Director of the Integrated Financial Group Consortium, and an ardent fan of the software, says, “It is the first process that engages the client in their retirement planning course of action from start to finish. As a result, decisions are made mutually."

The BetaVest planning tool is a new service that Jacobs Wealth Management has rolled out to its current clients, with half of their client base still needing to go through the process. Heath DeMarcy stated, “This is a proactive tool. We don’t want to be reactive with our client’s finances. We want them to see the potential problems and fix them before they affect their future income. This software allows us to do just that.”

While in the Atlanta area Heath and Larry also visited the Merit Financial Group, administrator of the Merit Retirement Advantage program – with which Jacobs Wealth Management has recently struck a partnership. The *Merit Retirement Advantage* offers clients the “401(k) Maximizer” which allows Larry and Heath, both certified on the Merit program, the ability to review the options offered in the client’s plan, assesses their risk tolerance and recommend an investment mix to optimize the performance potential of their assets. According to Heath, “*The Merit Retirement Advantage* has really gone over well with our clients and we’ve already seen some real successes with it. The workshops we conduct with our clients using this program have shown some measurable results.”

Using both of these new programs, Heath and Larry are working with clients to ensure they are getting the maximum benefit out of their retirement savings vehicles so that they will have “income for life.”

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About Larry Jacobs

Larry brings over 27 years of experience to his clients. Utilizing a thorough planning process, Larry's mission is to help successful individuals minimize federal, state and social security taxes, while securing their retirement and protecting their assets from liability.
His experience and extensive knowledge in Estate Conservation and Retirement Planning enable Larry to tailor retirement and estate plans which strive to produce substantial tax savings and accomplish his clients' objectives.

Larry is the creator of "The Independence Security Solution." This process seeks to help individuals maintain their retirement with independence and security. It creates a clear vision for the future and a plan to assist them with achieving their goals.

Larry supports the philosophy that each client deserves an ongoing relationship of open and unbridled integrity. Along with this dedication to honesty is a desire to continually educate his clients and keep them abreast of developments. He has presented several financial seminars to such organizations as DuPont, Bayer, Total and other petrochemical related industries.

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 six 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.intfingroup.com for more information about Mr. Jacobs, 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 Larry Jacobs and the consortium of advisors at Integrated Financial Group.
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