



**Karen Lee**  
Financial Planner, CFP™, CLU,  
ChFC, MSFS, AEP

## NEWS

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### ***Local Atlanta Advisor Selected to Serve on the Prestigious Securities America Advisory Council***

ATLANTA, GA (July 2, 2008) – Karen Lee has the honor of being selected for a three year term to the prestigious Securities America Advisory Council.

Securities America, the fourth largest independent broker dealer, selects some of their most successful representatives and advisors to solicit their advice and counsel. The Advisory Council meets bi-annually to brainstorm with senior leadership and provide feedback on strategy, tactics and marketing messages. Council members serve a 3-year term and represent a diverse mix of business, geographic region, gender and backgrounds.

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#### **About Karen Lee and Karen Lee and Associates**

Karen J. Lee of Karen Lee and Associates, LLC in Atlanta, Georgia offers financial planning services through her affiliation with Securities America Advisors, Inc. She has completed the CERTIFIED FINANCIAL PLANNER™ designation as well as her Chartered Life Underwriter and Chartered Financial Consultant designations. Karen has a Masters of Architecture from Tulane University and a Master's of Science in Financial Services from the American College. She also holds the Accredited Estate Planner designation.

Karen has worked in the financial services industry since 1987. During this time she has worked with hundreds of families, individuals, and small businesses in helping them to achieve their financial dreams. She has the comprehensive education and experience to handle all aspects of a person's financial situation. As evidence of this, Karen holds various licenses and registrations in the areas of insurance, securities, and investment planning.

### **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 Ms. Lee, Mr. Patrick and the Consortium.

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### **NOTE:**

When you need a professional to speak on complicated financial topics in an easy-to-understand and lively way, please call **Karen Lee** of Karen Lee and Associates, Inc.

Visit [www.KarenLeeandAssociates.com](http://www.KarenLeeandAssociates.com) for more information about **Ms. Lee** and her company.

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