



Contact: David Law
Investment Executive
The Gunther Group, LLC
Phone: 315-717-1941
Email: DAVID.LAW@securitiesamerica.com

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

Norwich Advisor Selected To Join Consortium of Independent Financial Planners

David Law joins the Consortium with 15 years of experience

NORWICH, NY (March 1, 2010) – Following an extensive “mutual selection” process, Norwich-based financial advisor David Law has affiliated his financial services practice with Integrated Financial Group, a consortium of professional advisors. David Law 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 new broker/dealer, Securities America, Inc. (one of the nation’s largest independent broker/dealers, member FINRA/SIPC).” David 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 David associate with us. He has an excellent reputation and is an experienced advisor in the Norwich 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 rigorous 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 disciplined 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 selection 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. “David 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 David Law

David combines the skills of analysis from his engineering training with his interest in transforming emotional decision-making into solid strategies in financial matters. After observing how many careful, rational persons reacted to market declines in 1987 and again in 2000-2001, he decided to change his focus in 2006 from providing technical and engineering solutions to helping clients to make better financial decisions, being selected in 2008 by MetLife for its financial planning training. The economic turmoil starting in 2007 graphically highlights how important it is to have an overall strategy which has the flexibility to successfully move past traumatic economic events. David concentrates on client concerns related to how to use money more effectively to (1) pursue personal goals such as reduced work hours to spend more time with family or in charitable activities; (2) use retirement account rollovers allocated to achieve diversification for future time periods of income, (3) build more robust business strategies for owners, executives, and retention of valued employees; (4) provide for loved ones in the event of temporary poor health or an accident; and (5) reduce risk by implementing strategies to better manage tax issues and potential long-term chronic health problems so that more money is kept with the business or the family.

A number of persons have confided that they have personally experienced or know of others who acquired funds from an inheritance or the sale of a house or business, only to find that without adequate planning their money did not last as long as expected. David also assists in dealing with changes in income and expenses, by using the years approaching retirement and in early retirement to better advantage, by protecting businesses against the impact of the loss of key persons, and by providing the means for a lifetime income for individuals, couples, and families. He enjoys seeing the control that clients gain over their lives as they separate the flood of sometimes conflicting information available on the Internet and in the news media from the workable strategies that make a lasting difference.

David gained valuable experience during 15 years of working with owners, executives and managers of companies in Virginia, Delaware, Maryland, New Jersey, Pennsylvania, and New York on solving technical issues. He compared what the financial media publicized with the outcomes after what he observed firsthand in the electronics, pharmaceutical, cosmetics and biotech companies where he collaborated with engineers and scientists to provide solutions for projects that would influence the future prospects of those companies. Besides using languages to enjoy a multicultural group of friends and travel, David enjoys water sports such as swimming and scuba diving. In volunteer activities he meets immigrants working to overcome traumatic past experiences to succeed in their newly-adopted country and also prison inmates whom he encourages to apply principles that will make for reentry into society as positive-minded, hardworking contributors.

About Don Patrick and Integrated Financial Group

Don Patrick brings over two decades of experience advising individuals, professionals, and businesses in a wide range of financial matters, from risk management, investments, and taxes, to general business consulting. He specializes in helping pre-retirees and retirees with the myriad of financial issues they face at this most important phase of their financial lives. The primary focus is to provide an income that they cannot outlive, improve returns, protect their principal, and reduce taxes.

He has been a consultant for the Small Business Administration, and was regional Vice President of Smathers & Company, a California based investment management firm.

Don was Vice President of the nationally recognized firm, Conway Financial Advisors, in Boca Raton, Florida. While at Conway, he was a financial advisor; he headed their investment research department; was Vice President of the advisory firm; and started and headed the firms' highly successful investment division. For twelve years, he was Director of Financial Planning and Investments at Porraro and Associates in Atlanta, Georgia.

Currently, Don is Managing Director of Integrated Financial Group a consortium of independent financial planners.

Don earned his MBA from the University of Southern California where he was graduated with honors. His major studies were small business development and finance. 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.

An aeronaut who's been flying since age 16, Don has logged 11,000 hours mostly in jets for the Air Force and Eastern Airlines. He volunteers for and is an ardent supporter of Angel Flight, a non-profit organization of volunteer pilots who transport individuals with medical and financial needs.

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Visit www.integrated-financial-group.com for more information about Mr. Law, 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 David Law and the consortium of advisors at Integrated Financial Group.

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