



Mario Yngerto, CFP®, ChFC

## NEWS

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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

# Local Dallas/Plano Advisor Selected To Join Consortium of Independent Financial Planners

*Mario Yngerto joins the Consortium with over 19 years of experience*

PLANO, TX (June 27, 2008) – Following an extensive “mutual selection” process, Plano-based financial advisor Mario Yngerto has affiliated his financial services practice with Integrated Financial Group, a Consortium of professional advisors. Mario Yngerto says, “This is truly an exciting day for my clients and associates at Genesis Wealth Management as we align with the services and support of Integrated Financial Group and our broker/dealer, Securities America, Inc. (one of the nation’s largest independent broker/dealers, member FINRA/SIPC).” Mario 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 Mario associate with us. He has an excellent reputation and is a respected advisor in the Dallas/Plano area.”

When a client retains an advisor that is part of the Integrated Financial Group consortium, they can be rest assured that they are dealing with an advisor that has passed a disciplined vetting process in order join the consortium. The consortium maintains strict requirements for all advisors who are allowed to associate with

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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. "Mario 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."

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### **About Mario Yngerto**

**Mario Yngerto** is a financial planner with Securities America Advisors, Inc., a registered investment advisor and a registered representative with Securities America, Inc. through which he provides clients a broad range of investment opportunities. Mario helps his clients seek financial freedom and independence through establishing clear goals and financial discipline. He works with his clients to prepare a plan that takes into consideration their goals, unique needs, time frames and risk tolerance. Mario is committed to educating his clients to make well-informed decisions and to find meaningful financial solutions.

Mario shares his enthusiasm about financial services with all the individuals, families, institutions and corporations he encounters. With over 19 years experience in financial services, Mario is uniquely equipped to assist his clients in achieving their financial goals.

Being a Certified Financial Planner™ (CFP®) Practitioner as well as a Chartered Financial Consultant (ChFC), Mario has an astute understanding of the diverse aspects of the financial planning process. Mario Utilizes the comprehensive financial planning methodology that integrates and encompasses tax planning, investment planning, retirement planning, and estate planning as well as insurance planning.

Retirement and Investment planning are two strategic areas that Mario considers his specialties, and he is available to speak to groups on these topics. At present, Mario presents retirement and investment planning corporate seminars, on a regular basis, to companies throughout Texas and Florida. Mario recently relocated his practice to Texas and resides in Frisco, Texas.

Mario is very active with the Financial Planning Association and currently serves on the board of the Dallas/Fort Worth Chapter as President. Mario has also recently been featured on CNN Español and publications such as Financial Planning Magazine, Investment Advisor, and Stocks, Futures & Options and Investment News.

### **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 eight states and nearly \$1 billion in assets under management through Securities America Advisors, 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. Yngerto, 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 Mario Yngerto and the consortium of advisors at Integrated Financial Group.