

# NEWS

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**Karen Lee,**  
CFP®, CLU, ChFC, MSFS, AEP

## Local Financial Advisor Speaks to Peers at National Conference

### *Karen Lee Explores How Best to Learn About Clients' Needs*

Atlanta, GA (June 23, 2009) – Karen Lee, an Atlanta-based CERTIFIED FINANCIAL PLANNER™ professional and President of Karen Lee & Associates, LLC, was a featured speaker for a break-out session at the Securities America National Conference held June 6-10, 2009, in Omaha, Nebraska.

Lee's topic, *Sometimes I Feel Like a Therapist Instead of a Financial Planner*, addressed the issue of clients' "money baggage," and the importance to advisors of being aware of that baggage in order to help clients successfully achieve their financial objectives. "Many people have a complex relationship with money and don't even realize how they are sabotaging their futures through their current spending," says Lee. "As advisors, we need to recognize that we're dealing with clients emotional issues about money, whether we like it or not."

Lee acknowledges that advisors don't necessarily have the ability to reform people. But by having deeper conversations with clients, they may recognize the need to change their behavior around money. Lee relies on listening skills, asks open-ended questions and uses her keen sense of humor to dig deep with clients.

Lee was also a panelist for the Super Women's Summit, a by-invitation preconference session led by industry influential Marie Swift, president of Impact Communications. Panelists addressed issues such as work/life balance; differences between men and women with regard to risk tolerance; and issues of business operations and practice management. The keynote speaker for the Summit was Marion Asnes, Editor-in-chief of Financial Planning magazine.

The conference offered 90 educational sessions, in the areas of business growth, financial planning, asset management, technology, compliance and practice management. Advisors and their associates from across the country gathered to attend sessions, secure necessary CE credits, network with colleagues for formal and informal sharing of best practices, and celebrate the 25<sup>th</sup> anniversary of Securities America.

### **About Karen Lee, CFP®, CLU, ChFC, MSFS, AEP**

Karen J. Lee of Karen Lee and Associates, LLC in Atlanta, Georgia provides financial planning services as an advisor with Securities America Advisors Inc. She is a CERTIFIED FINANCIAL PLANNER™ professional and holds Chartered Life Underwriter and Chartered Financial Consultant certifications. Karen has a Masters of Architecture from Tulane University and a Master's of Science in Financial Services from the American College in Bryn Mawr, PA. She also holds the Accredited Estate Planner designation. Since beginning work in the financial services industry in 1987, Karen has worked with hundreds of families, individuals and small businesses in helping them design a plan to achieve their financial dreams. She has the comprehensive education and experience to handle all aspects of a person's financial situation. Karen is the author of the forthcoming book, **It's Just Money - So Why Does It Cause So Many Problems**. For more information, visit [www.karenleeandassociates.com](http://www.karenleeandassociates.com).

### **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 is an office of 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 Don Patrick or Karen Lee and the consortium of advisors at Integrated Financial Group.

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