



Donald W. Patrick, CFP®

## NEWS

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# Local Financial Advisor is Featured Speaker During National Conference

## *Don Patrick Addresses General Assembly and Break-out Sessions at Securities America 25<sup>th</sup> Anniversary Event*

Atlanta, GA (June 25, 2009) – Don Patrick, an Atlanta-based CERTIFIED FINANCIAL PLANNER™ professional and Managing Director of Integrated Financial Group, addressed the general session of the Securities America National Conference held June 6-10, 2009, in Omaha, Nebraska.

Before an audience of 1000 attendees, Patrick participated in a live demonstration of the ground-breaking AdvisorPod online practice management series with Securities America's Senior Vice President of Strategy Kirk Hulett and Vice President of Wealth Management Paul Lofties. Patrick shared strategies for getting the most value out of attending professional conferences. (View Patrick's interview at [www.advisorpod.com](http://www.advisorpod.com).)

Immediately following the presentation, keynote speaker General Colin Powell spoke about leadership and the importance of putting followers in the best environment to achieve. During the speech, Powell acknowledged Patrick's impressive practice-building skills and leadership during times of economic trial.

Patrick was also a featured speaker during a break-out session with communications professional, Marie Swift, president and CEO of Impact Communications, where they conveyed the importance of public relations for financial professionals.

“With all the bad news related to Wall Street this past year,” says Patrick “it’s more vital than ever that independent advisors differentiate themselves as positive leaders in the financial services industry by educating the public on matters related to risk tolerance, market exposure and long range planning.”

In addition, Patrick served as a panelist during a session where he shared thoughts, tactics and strategies for building a successful branch office with in Securities America. He also participated in a practice management roundtable where he offered relevant best practices and actionable tools to run an efficient and satisfying practice.

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Over 90 educational sessions were offered, 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 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<sup>®</sup> mark of distinction. Integrated Financial Group, an independent financial planning consortium of advisors, delivers practical, effective financial solutions aimed at addressing the long-term financial planning needs of their clients.

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*. He is also a regular contributor to numerous financial trade and consumer publications, including Wall Street Journal, Kiplinger's Retirement Report, New York Daily News, Investment News and Research magazine. Learn more at [www.integrated-financial-group.com](http://www.integrated-financial-group.com).

#### ***About Securities America***

Headquartered in Omaha, Nebraska, Securities America, Inc. has more than 1,900 financial professionals nationwide with more than \$34 billion in client assets under their supervision. Securities America Advisors, Inc. is an SEC-Registered Investment Advisory firm with more than \$11.2 billion in assets under management and administration that offers investment management, financial advice and financial planning through financial advisors. As the business growth expert, Securities America's mission is to foster the success of financial professionals so they can provide quality, objective counsel and services to their clients. Additional information is available at [www.securitiesamerica.com](http://www.securitiesamerica.com).

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#### **NOTE:**

When you need a knowledgeable professional to speak on complicated financial topics in an easy-to-understand and lively way, please call Don Patrick and the consortium of advisors at Integrated Financial Group.

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SOURCE: Written by Impact Communications.