



Don Patrick, CFP®, MBA

NEWS

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Don Patrick Included On Industry List of Top 10 Branch Managers

Local Financial Advisor Sees Opportunity for Growth in Current Market

ATLANTA, GA (May 11, 2009) – Don Patrick, managing director of Atlanta-based Integrated Financial Group, has been named to *On Wall Street* magazine's annual list of Top 10 Branch Managers. As a branch manager for Securities America, Inc., one of the nation's largest independent broker/dealers (member FINRA/SIPC), Patrick supervises, mentors and motivates a consortium of 42 independent professionals who own their own businesses in Georgia, North Carolina, Louisiana, Missouri, Texas, New York, Louisiana, Kansas and Tennessee and about \$1 billion in assets under advisement.

Patrick traveled to New York City on May 5, where he and nine other branch managers from across the nation were honored at an awards dinner. [The program](#), sponsored by Mainstay Investments, paid tribute to branch managers in the financial services industry for their achievements in creating effective branch-wide marketing strategies; recruiting, developing and retaining talented advisors; and providing superior client service. The ten branch managers, were culled from an earlier list of [100 finalists](#), nominated by their peers and selected by a panel of [On Wall Street](#) editors.

"The past year has been particularly demanding for financial services firms," said Steve McWhorter, CEO of Securities America, Inc. "Don Patrick excelled despite an extremely challenging environment through hard work, strong ethics and a focus on providing the highest level of service to his clients."

A tenured advisor with over twenty years experience in the financial services industry, Patrick actually sees a great opportunity for independent financial advisors, in spite of current market conditions. "This should be a career year for independent financial advisors. They've been preparing their entire careers for this. So many people need our help," he says.

He also is taking advantage of the disruption in the industry to attract some disenchanted wirehouse advisors to their unique consortium of independent advisors and expects it to be one of his Best years for attracting the quality of advisor that meets the consortium's standards. He currently has three former wirehouse advisors preparing to join his

firm. "(Wirehouse advisors) pay a tremendous amount to have the firm's name behind them – names that have been recently smeared and destroyed," he says.

Patrick was only one of two branch managers associated with an independent broker/dealer to make this year's list.

About Don Patrick and Integrated Financial Group

Don Patrick, Managing Director of Integrated Financial Group (IFG) 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.

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.

The 42 advisors who comprise Integrated Financial Group have credentials including CFP®, CPA, MBA, MFS and average 15 years in the business. The advisors are entirely independent and brand themselves. IFG provides such amenities as class A office space and office managers, technology and various services that reduce an advisor's headaches and costs. Integrated Financial Group is supported by the Practice Management and Business Growth Experts at Securities America, one of the largest, independent broker/dealers in the United States. Visit www.integrated-financial-group.com for more information about Patrick and the consortium of advisors.

About Securities America, Inc.

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. Celebrating 25 years of in the industry, SAI is one of the nation's largest and most successful independent general securities broker/dealers. As a business growth specialist, 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.

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Securities offered through Securities America, Inc. Member FINRA/SIPC. Don Patrick Registered Representative. Advisory services offered through Securities America Advisors, Inc. Don Patrick Investment Advisor Representative. Integrated Financial Group and Securities America, Inc. are not affiliated.

Criteria for the *On Wall Street* Top Branch Managers List consists of 1) their commitment to excellence in creating an effective and competitive branch-wide marketing strategy; 2) their ability to identify, recruit, develop, retain, and reward talented advisors; and 3) their dedication to the goal of providing superior client service.

SOURCE: Impact Communications, Inc. with Don Patrick, Securities America, Inc. Registered Representative.