

Tapping into the 'brain trust'

Integrated Financial Group uses the power of a consortium to serve clients.

Integrated Financial Group is a consortium of elite financial planners, each independently owning his or her own financial planning practice, each with a unique style and special area of planning expertise. We sat down with the group to find out more.

Q: What can you tell us about the consortium?

Integrated Financial Group is one of the largest independent financial planning consortiums in the country. We pioneered a truly unique concept that we like to call our "brain trust."

This unique cadre of independent financial planners delivers practical, customized, and personal financial solutions for the long-term financial planning needs of its clients. Yet its clients benefit from the intellectual brainpower of a large consortium.

As independent advisers, we have no ties to one company or product; we have access to the entire universe of products, services and programs to select what we believe are the best solutions for our clients' unique needs. This aspect of independence is more important today than ever. Clients need to know that our advice is free from conflicts of interest that have recently plagued the brokerage and insurance industry.

As a result of introductions from our clients, we continue to grow. We are proud to be ranked among the top 25 financial planning firms by the *Atlanta Business Chronicle*.

Q: Why do you say this consortium is unique?

We operate as a team of professional experts, each contributing his or her unique expertise and perspective. The Integrated Financial Group consortium has attracted some of the brightest, most experienced and best educated financial advisers in our profession.

When clients retain an adviser that is part of the Integrated Financial Group consortium, they can be assured they are entrusting an adviser who has passed a strict vetting process prior to joining the consortium.

The consortium maintains strict require-



ments for the elite advisers who are allowed to associate with Integrated Financial Group. Some of the factors evaluated are experience, professional designations, education, a structured or comprehensive planning process, excellent client service standards and adherence to the consortium's ethical guidelines.

Additionally, every adviser who wants to join the consortium undergoes an extensive interview with the consortium's advisory board to ensure the adviser maintains similar philosophies and a passionate commitment to our profession, our standards and, most important, his or her clients.

In today's complex world of financial planning, every financial decision most likely has an impact somewhere else in your financial life. A sound financial plan will help you make better decisions and execute better strategies for wealth accumulation and/or wealth distribution.

Comprehensive investment planning, tax reduction strategies, lifetime income planning, risk management (health, life and long-term care analysis) and estate planning are all key areas that require thoughtful integra-

Q: What do the advisers who make up the consortium do?

Our advisers help their clients accomplish their greatest financial goals, whether it's:

- A comfortable retirement with an income that they will never outlive
- Cutting back at the office to work on their golf swing
- Evaluating an employer severance package
- Struggling to make sense of stock options
- Figuring out what kind of lifestyle the client can have after retirement
- Reducing their worries that they will outlive their money

We believe the best way to accomplish this mission for our clients is through the comprehensive financial planning process. But our job doesn't stop there.

We have the knowledge, the tools, the experience and the passion to bring as well as implement new and better ideas, strategies and results to our clients' lives. We also employ state-of-the-art technology to better serve you.

Finally, we have particular expertise few other advisers have for helping retirees and pre-retirees with The Income For Life Model™.

As a result, you, the client, are the winner. The financial world is too complicated to go it alone. Stockbrokers and insurance agents do not offer the comprehensive advice and products of a financial planner.

Our job is to be our client's planning partner for life.

We serve as a sounding board to help our clients make tough decisions; we are a resource for financial information, advice and solutions.

To learn more about this unique consortium, visit www.integrated-financial-group.com.