



NEWS

Contact: Morris Shank
Integrated Financial Group
314-469-3444
morris@ifgstl.com



Morris Shank, CFS
Financial Advisor

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 St. Louis Advisor Named 2008 FIVE STAR Wealth Manager

*Morris Shank receives top rank in client satisfaction among
wealth managers in the St. Louis area*

St. Louis, MO (April 18, 2008) – Following an extensive vetting process, St. Louis-based financial planner Morris Shank – a member of the Integrated Financial Group consortium, was named “2008 FIVE STAR Wealth Manager” by *St. Louis Magazine*.

In an effort to help local consumers identify some of the top wealth managers in the area *St. Louis Magazine* recently partnered with an independent research firm and sent evaluation surveys to 43,000 high-net-worth residents in the area and also to a handful of leaders in the financial services industry. On the surveys, recipients were asked to evaluate only wealth managers whom they knew through personal experience on nine criteria: customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale service, quality of recommendations, and overall satisfaction. The process continued as the evaluations were sent back and reviewed by a “blue ribbon panel” – comprised mainly of knowledgeable individuals within the financial services industry. The resulting 335 individuals on the list earned the title “2008 FIVE STAR Wealth Mangers” – a distinguished group representing less than 3 percent of the wealth managers in the St. Louis area.

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Don Patrick, Integrated Financial Group's Managing Director says, "Morris' client-focused, personal and dedicated process that he brings to his clients is just one of the many reasons that he truly embodies the FIVE STAR award."

Studies show that over half of the people with a net worth of \$500,000 or more rely on wealth management experts. The 2008 FIVE STAR wealth manager list will undoubtedly be a useful tool for these individuals to identify those advisors who have consistently earned the trust of their clients.

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About Morris Shank

Morris Shank has been helping people take control of their financial futures for over 15 years. Morris graduated from the University of Missouri with a BS in accounting and is a Certified Fund Specialist (CFS) through the Institute of Certified Fund Specialists.

Prior to starting his financial planning practice, Morris worked as owner operator of several small businesses. Before that, he gained valuable experience managing the Missouri sales territory for a national marine manufacturer. Morris enjoys helping clients refine their goals and develop a prudent financial plan. He specializes in developing master income distribution strategies to individuals transitioning to the independent income phase of their lives. Morris understands that while this transition can be difficult, he does want to be there to provide the needed attention and collaborative advice his clients have come to appreciate and expect. As a professional who's committed to client education, Morris understands that an informed individual has a better chance achieving their most important life goals. He helps people navigate myriads of personal and financial choices by providing the practical tools they need to make sound investment and financial decisions.

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 six 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.intfingroup.com for more information about Mr. Shank, 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 Morris Shank and the consortium of advisors at Integrated Financial Group. SAI#279588

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