



IFG DISCOVERY BROCHURE

From Independence to Growth with Integrated Financial Group

Discover the advantages of partnering with Integrated Financial Group and see how we can streamline the operation of your independent practice while significantly enhancing your business growth trajectory.



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Letter from our CEO.

Dear Potential IFG Member,

As a team, we are grateful for your interest in IFG and we look forward to getting to know you during our mutual selection process. Before you look through these pages, we are curious to know if you have heard these sayings:

"Iron sharpens iron."

"If you want to go fast, go alone. If you want to go far, go together."

"Many minds are better than one."



As a team we hold fast to these principles, and we see them at work every day. In fact, our founders' vision for IFG was created on the belief that independence does not mean you have to be alone. The idea of autonomy combined with a culture of caring and sharing are not mutually exclusive concepts. They enhance each other allowing all of us to be more successful. Our goal as a company is to find like-minded financial planners who desire to be independent business owners, while at the same time, be an active part of the Brain Trust.

Throughout the mutual selection process and displayed in the following pages, you will find that IFG's focus is on our members and fostering their success as business owners. We know from experience that our members win both personally and professionally when they can focus on three things:

1. Helping their clients
2. Spending time with their clients
3. Finding new clients

At IFG, we try to remove obstacles and take the challenging aspects of running a business off the plates of our members so they can focus on doing what they do best. You will find our team at IFG continually talks about this, and is seeking new ways to give members more time for what matters most: their clients!

Finally, our mutual selection process is not something we take lightly. It is designed to make sure that we are the right fit for you, and you are the right fit for us. The goal of our process is to help advisors find a home where they can grow, thrive and eventually create a succession plan for their business. An advisor who was not a fit for IFG said it best a few years ago: "IFG chooses members like the best financial planners choose their clients."

Throughout this process, our commitment to you is that we will ensure you end up at the right destination. We certainly hope it is IFG, but if not, we will do all that we can to help you find your place.

It is our pleasure to walk along this journey with you.

A handwritten signature in black ink that reads "J. Land Bridgers". The signature is written in a cursive, flowing style.

Land Bridgers
CEO





Our Value Proposition.

To help you maintain your independence and everything that comes with it, while achieving remarkable business growth.

At Integrated Financial Group, we understand that the true essence of financial advising lies in the delicate balance between maintaining independence and achieving remarkable growth. Our philosophy is founded on the principle that financial advisors should not have to sacrifice their autonomy in order to access the resources and support necessary for expansion.

Our unique culture and support system are designed to serve as a backbone for advisors eager to amplify their business. With IFG, you don't just gain access to your own virtual team and resources for compliance, business development, marketing, and much more; you become part of a nurturing community that thrives on mutual encouragement and shared success. IFG's network is one where experience and innovation cross-pollinate, allowing both new and seasoned advisors to glean insights from one another in a vibrant and cooperative environment.

We take pride in the fact that joining IFG means unlocking a world of **unlimited growth potential**. Our Advisor Development team is on hand to help you evolve as an advisor and a business owner, using a blend of personalized mentorship and communal wisdom. Our marketing experts are on call to provide tailored marketing strategies, combining traditional approaches with innovative digital marketing techniques to amplify your visibility in a crowded marketplace. Through our Brain Trust, we offer year-round opportunities at our Mastermind Groups and Annual Retreats to collaborate, sharing knowledge and strategies to propel each advisor towards achieving their full potential. And let's not forget, while we are serious about growth and development, **fostering a joyful and fun atmosphere** is just as important to us.

Consider IFG as your strategic advantage in an increasingly competitive market. By harnessing the collective intelligence of our members, you stay sharp, informed, and ahead of trends. Meanwhile, the comprehensive IFG support system allows you to delegate the more tedious aspects of your work, freeing you to focus on what truly matters - your clients and their financial well-being. Allow IFG to help you **redefine your work-life balance** and elevate your practice like never before.



Mastermind Groups.

EMBARK ON A JOURNEY OF SHARED GROWTH

Central to our ethos is the establishment of Mastermind Groups, a concept deeply woven into the tapestry of our mission. These groups are not so much a feature of our firm but the pulsating heart that provides life to every aspect of our operation.

The notion of Mastermind Groups traces its roots to some of history's most forward-thinking minds—innovators like Benjamin Franklin and visionaries like Albert Einstein. They embraced the Mastermind concept for intellectual cross-fertilization and collective progress. Inspired by their ingenuity, our founder, Don Patrick, and the pioneers of IFG translated this into practice.

By bringing together individuals, each a font of potential, the Mastermind Groups were born, built upon the adage that 'iron sharpens iron.' In this shared space, advisors found a fertile ground for growth, peer learning, and mutual support, sparking an evolution from professional networks into brotherhoods and sisterhoods of meaningful lifelong connections.

Our Mastermind Groups are not just about organization and accountability, they are crucibles for personal and professional achievement. Passionate about nurturing leaders who inspire others, these groups are ecosystems of empowerment guided by Don Patrick and Andrews Browne.

Here's what makes our Mastermind Groups unique:

- **Ownership:** Each advisor is an integral part of the group, taking responsibility for its triumphs and challenges.
- **Candid Conversations:** Structured yet open, our groups are safe havens for honest discussions—whether it's about enhancing IFG or your own growth.
- **Ground Rules:** With clear expectations, such as attending annual meetings, we ensure the longevity and efficacy of the group.
- **Shared Leadership:** Everyone gets a turn at the helm, fostering dynamic sessions that resonate with all members.
- **Preparation is Key:** Arriving ready to engage is part of the commitment each member brings to the table.

Joining an IFG Mastermind Group means committing to a shared journey of development—where success is measured not only by the wisdom exchanged but by the action it ignites.



Annual Retreat.

ENHANCING CONNECTIVITY AND COLLABORATION AT IFG

Here at IFG, we recognize the unparalleled value of face-to-face collaboration, which is why we host an Annual Retreat in Atlanta every January. This event coincides with our advisors' travels, making it convenient to include in-person Mastermind Group sessions by arriving a day early or staying a day later. Although we leverage virtual meetings, we prioritize in-person gatherings by organizing at least one or two significant trips annually. For example, a delightful retreat near Port Charlotte, Florida, provided both advisors and spouses an opportunity to blend leisure with productive discussions, strengthening bonds outside of professional roles.

To maximize the benefit of these gatherings, we encourage participation from the advisors' teams, bringing fresh insights into our discourse. Embracing this model, our own staff share their insights, enriching the LPL advisor community and promoting a culture of continuous learning. Recognizing the future, we also involve next-generation advisors, offering mentorship in business fundamentals from experienced mentors. Outside Mastermind Groups, our Associate's Best Practice Forum, held bimonthly, delivers crucial expertise to our support teams. Furthermore, by forming Mastermind Groups around various criteria, we uphold a learning environment free of egocentrism, committed to collective growth.



The IFG Support System.

Integrated Financial Group operates from the bustling heart of Atlanta, Georgia, as a titan within the LPL ecosystem, embracing a vast network of 67 teams that span across 13 states. With vibrant contributors who range from longstanding members to the newest additions, the strength of IFG's community lies in its unity and diversity. Built on the cornerstone of collective intellect and shared experience, we pride ourselves on our culture of varied perspectives and the commitment to genuine mentorship that empowers us to deliver superior service.

Running your own practice brings the autonomy to drive your business but also a sudden influx of responsibilities like administration, marketing, HR, compliance, and IT. No longer backed by the corporate teams at a larger firm or wirehouse, these critical tasks fall squarely on your shoulders, leading to the inevitable realization that it's time to consider outsourcing.

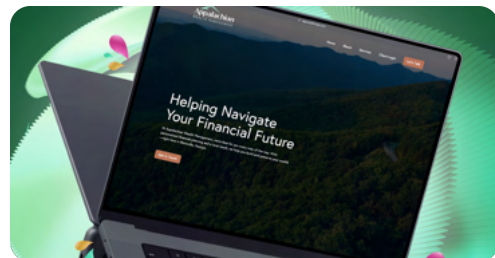
Enter: the IFG support system, meticulously designed to effectively reduce your workload significantly. As a member, you gain access to a dedicated team of personal advisors and specialized support staff ready to take on an extensive range of administrative, marketing, compliance, HR, and IT tasks. By entrusting these essential but time-intensive duties to your IFG team, you are freed to refocus on client relationship building and core revenue-generating activities, ensuring that client service remains at the heart of your practice.

Marketing Your Practice.

Marketing your independent practice is vital as it serves as the lifeblood of attracting and retaining clients, building brand recognition, and establishing your unique value proposition in a crowded marketplace. For many IFG members, the challenge of effectively marketing their services is a commonly faced hurdle. Independent financial planners often excel in client service and expertise but may lack the time or specialized knowledge to create and implement consistent marketing strategies. This oversight can lead to missed opportunities and stagnation in business growth as potential clients remain unaware of the exceptional service waiting for them.

Understanding this critical need, IFG's support system steps in to transform your marketing efforts from a pain point to a powerful tool in your business arsenal. With IFG, you're not alone in navigating the complex world of marketing—our offering includes a thorough audit of your existing strategies, identifying what works and where there's room for enhancement. From there, we offer guidance to help you align your marketing efforts with your business goals and give you the option of hiring our vetted marketing professionals to work on the following:

- Website Redesign
- Logo & Branding
- Establishing Brand Voice
- Search Engine Optimization
- Email Marketing Support
- Content Marketing
- Videography & Photography
- Graphic Design
- Presentation Deck Design
- Brochure Design
- Pay Per Click Advertising
- Conversion Opportunities
- Ongoing Tracking & Analysis



Membership Criteria.

Our membership criteria mirror the careful decision-making process that the finest financial planners use to select their clients, underscoring a commitment to excellence in every facet of our collaborative community. As we navigate the mutual selection journey, we seek individuals who epitomize experience, exhibit advanced professional qualifications, and follow a discreet financial planning methodology.

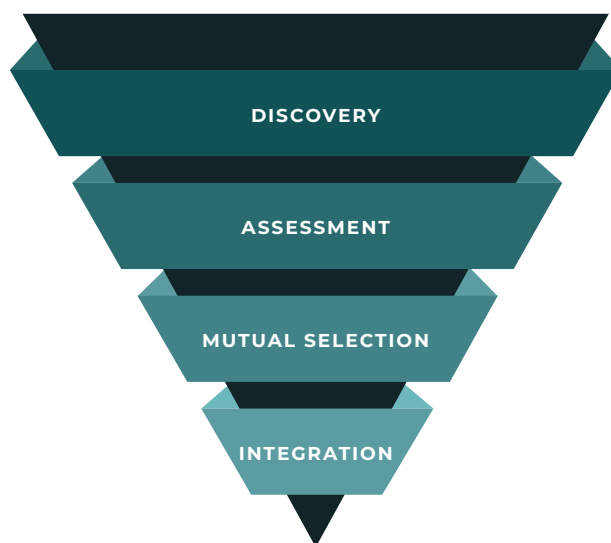
While the most important quality we look for in an advisor is an eagerness to contribute to the collective knowledge base and growth potential of our members, the following is a list of criteria we assess during our mutual selection process:

- Experience
- Professional designations and education
- Disciplined financial planning process
- Excellent client service standards
- Adherence to the consortium's ethical guidelines

Here is what you can expect from our Mutual Selection Process:

- Introductory Meeting
- Discovery Form
- Discovery Meeting
- Business Assessment Meeting
- IFG Home Office Visit (HOV)
- LPL Home Office Visit (HOV)
- IFG Advisor Interview
- Spouse Meeting
- Decisions & Commitment Meeting
- Begin building a Transition Plan with Advisor Development Team

MUTUAL SELECTION PROCESS





Getting Started.




Reach out today—let's explore how IFG's unique approach can align with your individual aspirations, crafting a path toward collective success.

YOUR ROAD TO INDEPENDENCE WITH IFG STARTS HERE.

As we stand at the intersection of individual prowess and collective growth, IFG continues to redefine the realm of independent financial planning. Our advisors are not just members; they are pillars upon which our firm's reputation is staunchly built—turning individual success into communal triumph. We see in every new addition to our group an opportunity to expand our horizons, to blend distinctive expertise with our progressive tactics, establishing a beacon of excellence within the financial industry.

Embarking on this journey with IFG means joining a lineage of professionals dedicated to reimagining the future of financial planning. To unlock the possibilities that our partnership has in store, we invite you to get started. Reach out today—let's explore how IFG's unique approach can align with your individual aspirations, crafting a path toward collective success.

To get started, contact us to schedule a consultation, and together, we'll determine if we are poised to achieve greatness together as partners!

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