


ADVISOR DUE DILIGENCE CHECKLIST



We've created the checklist below to help you compare Integrated Financial Group to other financial planning consortiums. The information is based on IFG's service offerings for 2025.



The IFG Consortium		COMP 1	COMP 2
A Collaborative Network of Excellence			
Unique Culture: A strong, collaborative environment for all members to leverage for reaching their full potential.	<input checked="" type="checkbox"/>		
Annual Advisor Retreat: A retreat for advisors, by advisors, with 70% of the presentation time led by your peers.	<input checked="" type="checkbox"/>		
Monthly Consortium Briefings (MCB): Stay updated on trends, best practices, and initiatives as our MCB acts as a filter for you.	<input checked="" type="checkbox"/>		
The Brain Trust: A network of independent advisors committed to sharing and exploring innovative ideas with each other to promote growth.	<input checked="" type="checkbox"/>		
Strategic Guidance: Tap into thousands of years of collective experience and expertise to build the business you've always envisioned.	<input checked="" type="checkbox"/>		
Advisory Board: Leverage high-level insights from a firm that values and relies on its advisors to drive key decisions	<input checked="" type="checkbox"/>		
Tech Stack Support: Create the tech stack that best supports your growth and efficiency.	<input checked="" type="checkbox"/>		

Advisor Development



COMP 1

COMP 2

Helping You Build & Scale Your Practice

Practice Management & Growth:

Tailored strategies for growth, team building, continuity, and succession planning.

**Honeybee Initiative:**

Share and learn from the best practices of your most successful peers.

**Mastermind Groups & Strategy Workshops:**

Collaborate and innovate on a regular basis with like-minded peers.

**Advocacy & Escalation:**

Dedicated support to handle challenges and escalations, ensuring your team can focus on what matters most.

**Training & Development:**

Access workshops, events, and a comprehensive library of resources.

**Business Assessments & Simplified Planning:**

A proven process to identify opportunities and streamline operations.

**Crisis Management:**

Expert guidance when you need it most.



Advisor Recruiting



COMP 1

COMP 2

Building Teams That Thrive

Recruiting & Vetting:

Assistance with recruiting the right talent to help grow your practice.

**Cultural Alignment & Mentorship:**

Help with training and development for you and your team.

**Transition Support:**

Smooth onboarding and integration into the IFG ecosystem.

**Determining Your Needs:**

Assistance with job descriptions and career paths.



Investment Solutions



COMP 1

COMP 2

Trading Simplified

Custom Trading Models:

Access exclusive models and tailored trading options.



Tax Analysis & Reporting:

Optimize investment strategies with in-depth insights.



Trading Support:

Fast execution, drift reports, and error investigations.



Transition Assistance:

Perform gap analysis and implement solutions for a smooth transition.



Advisor Training:

Master trading software and tools for your practice.



Marketing



COMP 1

COMP 2

Grow Your Brand & Reach

Brand Development & Design:

Establish and refine your unique identity.



Lead Generation & Campaign Management:

Drive new business through data-backed strategies.



Digital Marketing Services:

SEO, PPC, content, social media, and web design.



Videography & Photography:

High-quality visuals for impactful storytelling.



Performance Insights:

Data analysis and KPI reporting to track success.



ASAP (Virtual Assistant Team)



COMP 1

COMP 2

Your Back-Office, Simplified

Account Management:

From opening accounts to handling rollovers and transfers.

**Client Communication:**

Professional support for scheduling, emails, and notifications.

**Compliance Submissions:**

Expert handling of LPL advertising tools and Orion trade requests.

**Meeting Preparation:**

Streamline client meetings with tailored prep and follow-up.

**Project Management:**

Proactive support for administrative tasks and training.



Operations



COMP 1

COMP 2

Foundation for Your Success

HR & Benefits Support:

Payroll, group health insurance, and performance management services.

**Office Management:**

Infrastructure and technology support for HQ advisors.

**Cybersecurity Insurance & Vendor Management:**

Secure, efficient operations.

**Onboarding & Offboarding:**

Seamless transitions for new hires and team changes.

**Bookkeeping & Billing:**

Simplify your financial operations.



Trusted Support to Keep You Secure

Technology Optimization:

Reduce friction with compliant technology solutions.

**Cybersecurity Insurance & Education:**

Protect your practice and clients with advanced safeguards.

**Solutions-Focused Guidance**

Proactive compliance support from a team that gets to know you and your business intimately.

**Navigate Regulations Confidently:**

Help you stay compliant and mitigate risk as industry rules constantly evolve.



Hi, I'm Land Bridgers, CEO of Integrated Financial Group. As a team, we are grateful for your interest in IFG and we look forward to getting to know you.

IFG is founded on these ideas:

"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.

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 continually talks about this, and is seeking new ways to give members more time for what matters most: their clients!

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.

Land Bridgers, CEO



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Advisory Services are offered through IFG Advisory, LLC, a registered investment advisor.