



A CONSORTIUM OF INDEPENDENT FINANCIAL PLANNERS

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*Managing Director*  
*Integrated Financial Group*

#### **Practice Areas**

- Retirement Income Planning
- Estate Planning Strategies
- Business Planning & Consulting
- Professional Investment Management
- Risk Management and Insurance Planning

#### **Education/Certification**

- CERTIFIED FINANCIAL PLANNER™ professional
- MBA in Finance, University of Southern California
- BBA in Finance/Economics, Loyola University, LA
- Who's Who of Investment Management Consultants
- Member: Financial Planning Association

#### **Media Resource**

- Book Author: *Keep Your Nest Egg from Cracking – What you need to know.*
- Regular Financial Columns – Senior News and [Investorsalley.com](http://Investorsalley.com)
- Weekly Financial Radio Talk Show – WIOD and WINZ in South Florida
- Wall Street Journal
- Journal of Financial Planning
- Frequently Featured National Speaker

## **Donald W. Patrick**

### **MBA, CFP®**

Don Patrick brings over two decades of experience advising individuals, professionals and businesses in a wide range of financial matters, from risk management, investments, and taxes, to general business consulting. He specializes in helping pre-retirees and retirees with the myriad of financial issues they face at this most important phase of their financial lives. The primary focus is to provide an income that they cannot outlive, improve returns, protect their principal and reduce taxes.

He has been a consultant for the Small Business Administration, and was previously regional Vice President of Smathers & Company, a California based investment management firm. Don was also Vice President of the nationally-recognized firm, Conway Financial Advisors, in Boca Raton, Florida. While at Conway, he was a financial advisor; he headed their investment research department; was Vice President of the advisory firm; and established/headed the firm's investment division. For an additional twelve years, he was Director of Financial Planning and Investments at Porraro and Associates in Atlanta, Georgia.

Currently, Don is Managing Director of Integrated Financial Group an elite consortium of independent financial planners.

Don earned his MBA from the University of Southern California where he was graduated with honors. His major studies were small business development and finance. 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.

An aeronaut who's been flying since age 16, Don has logged 11,000 hours mostly in jets for the Air Force and Eastern Airlines. He volunteers for and is an ardent supporter of Angel Flight, a non-profit organization of volunteer pilots who transport individuals with medical and financial needs.

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