Integrated Partners Welcomes Six New Financial Advisors, and Their Ten Team Members; Adds $136M In New Assets

- *All of the teams join from within the LPL ecosystem, in a change of OSJs*
- *Three of the advisors joining are military veterans, officers from the US Navy and US Air Force*

BOSTON, MA – June 12th, 2019 – Integrated Partners, a national financial planning and registered investment advisory firm, is proud to announce the addition of four financial advisory teams to the organization, all with a core focus on serving active-duty members of the Armed Forces, veterans, and their families. The four teams hail from New Jersey and Virginia, led by Air Force and Navy veteran officers. Already within the LPL universe, the teams are transitioning to Integrated so that they can access and deploy the firm's robust and time-tested growth-catalysts. Collectively the firms bring $136M in advisory and brokerage assets to the firm.

The four new advisory teams joining will all operate under their own DBAs, and are as follows:

- Eric and Sabine Bressman (Phoenix Wealth Strategies, VA)
- John and Claudia Exner (Total Financial Picture, VA)
- Kirk Baur, Ramona Santos (Glide Path Financial of NJ)
- Pam Rodriguez (Phoenix Wealth Strategies, VA)

Eric Bressman is a retired US Navy Supply Corps Officer, John Exner a retired Deputy Commander in the USAF, and Kirk Baur a Lt. Colonel, USAFR. Claudia Exner is an operations manager and Sabine Bressman, Ramona Santos and Pam Rodriguez are all financial advisors and military spouses who have served their country in equal measure.

"We are honored to be selected as the home base for these outstanding financial advisors and their teams," said **Paul Saganey, founder and president, Integrated**. "That former military veterans, who have honorably served our country, have chosen to join us gives me a great sense of pride. Their exemplary service records speak for themselves, but when you couple that with their current mission to serve military families as well as civilian families in need of top-tier financial counsel. . .suffice to say that we are all inspired and energized by these folks every day."

Key factors in the teams' assessment and selection of Integrated were:

- A growth-focused culture
- A transparent and collaborative team environment
- Better economies of scale (operational support, lower costs)
- Investment management platform overseen by Dr. Rob Brown
- Advanced financial planning strategies and tactics
- Inclusion in the CPA referral program

"As a group, we have always believed that if we take care of our clients and our communities, they will take care of us," said **Eric Bressman, Team Leader, Phoenix Wealth Strategies**. "Service, to our families, to our clients, to each other and our country, is what drives us. We found a kindred spirit in Integrated, as they believe in serving advisors and empowering them to grow in an open-architecture entrepreneurial environment, in line with the advisors' vision. This move will help us help our clients, and we're excited to join this team."

Rob Sandrew, senior vice president and head of recruiting at Integrated, adds: "As we see the independent financial advisory landscape continue to transform, with old-guard "roll-up" firms either going public, or selling to large Wall Street banks, we continue to believe in our model for independence. We're simply looking for teams committed to growth, and business building on their terms. Nothing makes us happier than when we can help our advisors to build the businesses they've always envisioned."

In addition to the afore-mentioned advisors, Integrated welcomes new administrative team members Zachary Aardahl, Holly Gable, Holly Hopkins, Andrea Cowan, Suanne Kennedy, Brendan Exner, Laurie Lamola, Patricia Pooree, and Gustavo Rodriguez.

For more information, please visit www.ifpadvisor.com or e-mail **jason.lahita@ifpadvisor.com**

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About Integrated Partners

Since 1996, Integrated Partners has been helping financial advisors to achieve their entrepreneurial vision. We offer comprehensive business building services, designed with the truly independent advisor in mind. With one hundred and thirty-six advisors, one hundred and twenty-seven CPAs and forty regional offices across the United States, Integrated has built our reputation advisor by advisor, client by client. Constructed and grown upon a foundation of empowerment, integrity and trust, we believe in the power that financial advisors have to make a positive impact on people's lives. Integrated supports advisors by offering a completely customizable open architecture business environment: technology, investment management, advanced planning, CPA partner program, family office platform, custody, marketing, public relations, M&A, succession planning and comprehensive business counsel.

We believe in advisors. Let us prove it to you.

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