



Alex Chalekian, Lake Avenue Financial Join Integrated Partners

- *Alex will assume the role of Head of Practice Acquisitions; Lake Avenue Financial will transition to Integrated's RIA within 90 days*
- *Partnership indicative of Lake Avenue's focus on growth and Integrated's focus on continuing to bring value to the table for advisors by way of adding exceptional talent*

Boston, MA (Live from the Riskalyze Fearless Investing Summit) – October 2nd, 2019 – [Integrated Partners](#), a national financial planning and registered investment advisory firm, is proud to announce that Alex Chalekian and his registered investment advisory firm Lake Avenue Financial, are joining as the latest dynamic team to identify Integrated as an outstanding option for growth-oriented entrepreneurs. Well known in the financial advisory community, **Alex Chalekian** and his team have been considering their options with regard to growth and business evolution catalysts for some time. After many months of discussions with Integrated senior leadership, a partnership was formed that preserves the core integrity of the Lake Avenue model while also adding Alex to the leadership team as Head of Practice Acquisitions.

Lake Avenue already has a relationship with LPL Financial, which lends considerable synergies to the deal. Already a well-respected industry speaker and thought leader with regard to M&A and advisor marketing, Alex will apply his expertise to the task of accelerating Integrated's already rapid growth, by way of identifying inorganic growth strategies for existing, and future, Integrated financial advisory firms. He will also focus on succession planning counsel internally, as the older generation of advisors begins to consider planning for their own retirement. Rosa Chalekian, vice president of operations, a respected industry spokeswoman in her own right, will maintain her focus on Lake Avenue but will also feature prominently in future PR and marketing campaigns for Integrated.

"It was important for us as a team to retain our independence as an advisory firm, while also partnering with a firm that could accelerate our growth and in turn provide an opportunity to add value for fellow advisors," **said Alex Chalekian, CEO, Lake Avenue Financial**. "I first met **Jason Lahita** at the inaugural **Riskalyze Fearless Investing Summit** two years ago. It is fitting that we're announcing our teaming up at the 3rd installment of this amazing conference. I look forward to joining the leadership team and helping to grow this organization into an industry powerhouse."

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

- An independent, entrepreneur-first advisor support structure
- No disruption to Lake Avenue clients or team
- Open architecture – keep the tech you love, choose your own adventure
- A firm with a shared vision regarding the future of the independent channel, and advisors
- A priority on social media, PR and marketing
- Discretionary access to Integrated's a la carte growth catalyst plug and play resources (CPA program, Family Office, Business Alliance, investment management)

"I believe, down to my very bones, that there is not another advisory firm in the industry as committed to growth, evolution and improvement, as we are," **said Paul Saganey, founder and president, Integrated**. "The Chalekians and their team represent all that is good about the independent financial advisory community today, as well as the incredibly bright future of this space. They will help us, and their fellow



advisors, to grow and realize their entrepreneurial visions – and we will reciprocate by helping them to grow their business, offering all of the substantial resources to them that a firm of our size and scale can deliver.”

Rob Sandrew, senior vice president, business development, Integrated adds: “If you look at all of the deals we’ve announced this year to date, and the ones we’ll be announcing throughout the remainder of 2019, you’ll notice a pattern: outstanding advisors with no ceiling on growth potential who are high energy, active participants in the continued rise of the independent financial advisory community and want to be part of something bigger than themselves. We had numerous meetings with Alex and Rosa during the course of exploring a partnership – each one centered on helping advisors and making a difference. That’s exactly what we have been, and will continue, to do.”

Integrated Partners is seeking highly motivated, growth focused, client-centric financial advisors and their teams to join a national financial planning and advisory firm. To learn more about our model, and whether or not you are a potential fit, please e-mail robert.sandrew@integrated-partners.com.

Media inquiries: Jason Lahita – jason.lahita@integrated-partners.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 forty-three advisors, one hundred and twenty-seven CPAs and forty-one regional offices across the United States, and approximately six-billion in brokerage and advisory assets, 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.

The financial consultants of Integrated Partners and Lake Avenue Financial are also registered representatives with, and securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Integrated Financial Partners, a registered investment advisor. Lake Avenue Financial, Integrated Financial Partners and Integrated Partners are separate entities from LPL Financial.

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