Juncture Wealth Strategies Chooses Integrated Partners

- *$200M+ Scottsdale Registered Investment Advisor, once a Wells Fargo team, will lead Integrated's breakaway-broker recruitment and transition initiative*
- *Fee-only RIA custodies with both Charles Schwab and TD Ameritrade, and will continue to do so*

Boston, MA – October 23rd, 2019 – Integrated Partners, a national financial planning and registered investment advisory firm, is proud to announce that Juncture Wealth Strategies, a registered investment advisory firm based in Scottsdale, AZ, are joining as the latest dynamic team to identify Integrated as an outstanding option for growth-oriented entrepreneurs. Juncture serves high-net-worth and ultra-high-net-worth individuals and families. The firm is led by Barry Rhonemus, and will also focus on recruiting breakaway brokers and transitioning them to independence on behalf of Integrated. The Juncture team previously made the leap to the independent channel in 2010.

In addition to Rhonemus, Integrated gains three highly experienced financial services professionals, Mahes Prasad, Jack Barker, JD, CPA, and Brad Haines, CFA, FRM. Prasad will work closely with Rob Sandrew to engage advisors across all industry channels as a member of the recruiting team. Barker will work closely with the Integrated Family Office team, and Haines will join Dr. Rob Brown on the investment management team.

"We joined the independent financial advisory community about ten years ago, and it has been an amazing journey," **said Barry Rhonemus, founder, Juncture Wealth Strategies**. "Over the last year, we've spoken to at least twenty different firms, exploring every conceivable model – in talking to Integrated, it quickly became clear to us that they offer the scale and resources we need to more quickly make our entrepreneurial aspirations a reality. Everything fits – the value-adds for our firm, the flexibility, the ethos. . . but perhaps most importantly, the caliber of the people we're joining. This team is special."

"We're looking for top-tier, fully engaged financial advisors and their teams to join Integrated, not for the assets, not for the revenue – forget the numbers for a minute," **said Paul Saganey, founder and president, Integrated**. "This is about a vision we have, about the potential we see for our organization to not simply grow, but to grow with purpose and passion. We're looking for advisors who have the courage of their convictions and a burning desire to be a part of something special, something bigger than themselves. This describes Barry and his team to a tee, and I am so proud to partner with them."

Mahes Prasad, vice president, business development, adds: "This is a process, actually more like an ongoing conversation, that has taken many weeks. Many meetings, phone calls, many meals together. Every single one reinforced our first impression which was that, quite simply put, we really like these people. The fact that they have built such a dynamic financial advisor growth engine that firms can plug into while maintaining control and the integrity of their own business model, is impressive."

Rob Sandrew, head of advisor recruiting, concludes: "We've been adding advisors who want to make a difference. We don't view ourselves as an 'aggregator' or a 'consolidator' or even a 'super-OSJ' – those terms are meaningless labels to us. We're a financial advisory team working to improve our clients' lives and improve our industry (and ourselves), constantly. To be candid, when we attract individuals like Barry and Mahes and their team, it gives me chills – we must be doing something right. And we're going to keep doing it."

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-parters.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-six advisors, one hundred and twenty-seven CPAs and forty-two regional offices across the United States, and more than 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.

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