Why Are We Different?

At Integrated Financial Partners, the relationship doesn't end once we complete our work and you implement your plan.

Our name and reputation was, and continues to be built on service. The personal attention that our organization provides is one of the primary reasons our clients become partners for life. Our independent objectivity can mean a world of difference when planning for your future.

Talk to us about:

- Fee-Based Planning
- Retirement Income Strategies
- Beneficiary Planning
- Tax Reduction Strategies
- College Funding
- Portfolio and Investment Analysis
- Life Insurance
- Wealth Accumulation
- Legacy Planning
- Family Income Protection
- Long-Term Care Insurance
- Disability Income Insurance
- 401(K) Rollovers
- Business Owner Planning
- Key Executive Benefits
- Charitable Gifting Strategies
- Benefit and Compensation Plans

IFP
Integrated Financial Partners®

Facts

Our clients receive the best of both worlds: the individual attention that comes from having a personal financial advisor along with the deep level of resources from both Integrated Financial Partners and LPL Financial.

Objectivity From investments to risk management, we have an open platform and access to hundreds of companies, so you have options when implementing your plan.

Service You will receive individual attention and personalized service from your experienced advisor who can help translate complex financial matters, allowing you to make informed decisions.

Technology Conveniently access your account information online, through state-of-the-art technology platforms. Consolidated reports allow you to view your accounts in a simplified, more manageable format.

Experience We have years of experience helping people accumulate wealth, transition their businesses efficiently and prepare for retirement. Advisors at IFP have the knowledge to help guide you through all of life's financial challenges.

Integration By working closely with your tax and legal advisors, we can help ensure that your financial plan is coordinated and comprehensive. This holistic approach enables us to design and implement prudent strategies to help you now and in the years to come.

Regional Resources Integrated Financial Partners is an independent group of advisors with 25 offices along the east coast. Our dynamic proprietary software and team of specialists provide the resources our advisors need to properly analyze your assets and build your plan so you can work toward the highest probability of success in reaching your goals.

National Resources LPL Financial is one of the leading financial services companies and the largest independent broker/dealer in the nation.* Formed in 1989 through the merger of Linsco and Private Ledger (founded in 1968 and 1973 respectively), LPL was established to serve as the Main Street investor's alternative to Wall Street. An experienced, proven and objective partner, LPL has no proprietary products, investment banking business, or any other conflicts that get in the way of providing independent, objective recommendations.

*As reported in Financial Planner Magazine, June 1996-2016, based on total revenue.

Solid Strategies for Changing Times™

IFP
Integrated Financial Partners®

www.IFPadvisor.com

How We Help You

The Financial Second Opinion™

Your financial health is too important to leave to chance.

Who is looking at the pieces of your financial puzzle to see if you are on track? Our comprehensive Financial Second Opinion™ provides an objective, life-impacting view of your current position and projects its probability of success.

Lifetime Income Model™

Live for today with a sense of security for tomorrow.

Planning for your financial future takes careful consideration. A new stage in life requires a new strategy. Our Lifetime Income Model™ is designed with a goal to help provide a reliable, tax efficient stream of income so you can enjoy the retirement you deserve.

Plan for Financial Comfort™

A goal without a plan is just a dream.

Marriage, children, job change, divorce and death are all life events that create the need for competent and compassionate planning. Our 6-step Plan for Financial Comfort™ can have a profound effect on you and your family.

Our planning process puts the emphasis on you and your needs, not on a prepackaged set of solutions or ideas. We are committed to providing you with the information you need to make timely, informed decisions about your financial future.

The benefits of this approach are quickly apparent - you enjoy a greater understanding of the impact of various options and are better positioned to make the best possible decisions for you and your family.

The Business Owner Model™

A logical process to help you make informed decisions.

Are you leveraging your business to achieve your personal goals? You face many issues; retention, benefits, continuity planning and daily operations. We can help you evaluate your situation and provide resources so you can make informed decisions.

Legacy Discussion™

Taking the time to plan for future generations.

Are your assets protected from creditors and predators? Will your estate plan resolve or cause family conflict? With taxes, inflation, medical costs and longevity there are many factors to consider. We can help you plan for emergencies as well as enduring legacies.

The Integrated 401(k)™

Striving to maximize tax reductions while taking care of employees.

Are you happy with your retirement plan's performance and fees? Are you in full compliance with ERISA regulations? We can benchmark your current plan to ensure it is viable and meets your current and future needs.

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