

NEWS

For Immediate Release



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Integrated Financial Group Successfully Holds 2022 Retreat In-Person in Atlanta

Highlights included numerous peer-led breakouts, keynotes from Dan Arnold, Andy Kalbaugh, Lex Stolle, and Marie Swift, plus \$5,000 donation to the Rally Foundation

ATLANTA, GA (February 8, 2022) – [Integrated Financial Group](#) (IFG), a consortium of independent financial planners dedicated to leading the fiduciary standard for the investment and wealth management industry, recently held their 2022 Retreat for their advisor “brain trust” members, staff, and sponsors. The in-person event, which ran Thursday, January 20 through Saturday, January 22, was held at The Hotel at Avalon in Atlanta and attended by over 70 IFG advisors.

Keynote speakers at the retreat included:

- Dan Arnold, President and CEO of LPL Financial
- Andy Kalbaugh, Former Managing Director and Divisional President of National Sales at LPL Financial
- Marie Swift, President and CEO of Impact Communications
- Lex Stolle, a 12-year-old cancer survivor and motivational speaker

Additional sessions were led by:

- Land Bridgers, CEO of IFG
- Don Patrick, Founder and Chief Strategy Officer of IFG
- Brice Silver, Director of Investment Solutions at IFG
- Heather Hawthorne, Director of Marketing at IFG

Advisor spotlight sessions included:

- Rebekah Fero, Principal of Fero Financial
- Shane Gaddy and Kelly Lee of Strong Gaddy Lee Wealth Management Group
- Trent Adams, Partner of Magnolia Financial group
- Morris Shank, Founder of Morris Shank Wealth Management
- Howard Katz, Managing Partner of Linea Private Wealth Management
- Brian Quinn, Financial Advisor of Searcy, Weems-Scott & Quinn

In addition to the presentations, IFG advisors networked with their peers and shared the tangible, actionable steps that they have taken to grow their business or grow their team, as well as the different software, technologies, services, strategies, and methodologies they're using. These concepts were shared not only from the stage, but in breakout sessions and in between sessions throughout the retreat.

Sponsors for the 2022 retreat included Allianz, Athene, Dimensional Funds, Fidelity, Franklin Templeton, Goldman Sachs, Invesco, Jackson National, Kensington Asset Management, Lincoln Financial, MFS Investment Management, Nationwide, Russell Investments, and Symetra.

To view a compilation and highlight video from the 2022 IFG Retreat, [please click here](#).

Integrated Financial Group is already planning ahead for the 2023 Retreat, which will be held January 19th-21st at the same location, The Hotel at Avalon in Atlanta. More info will follow later this year.

CLIMBING THE ENTREPRENEURIAL LADDER

“For many of our advisors that joined us in the last few years during the pandemic, this was their first retreat,” said Land Bridgers, CEO of Integrated Financial Group. “And though they came in with high expectations, many of them reached out to me afterwards and said that the retreat was everything they expected and more, and that it ended up exceeding their expectations – from how they were welcomed into the group, what they learned from peers and presenters, and the overall themes.”

“This was my first IFG retreat, and all of the other advisors and IFG team members were the most welcoming and gracious group of people in the industry I think I’ve ever met,” said Margaret Kosmerl, President of Blue Heron Financial Group. “I attribute that to IFG’s vetting process and making it a priority to maintain a culture of like-minded advisors. Whether it was the Mastermind group or the attendees in general, the desire to share, learn, and grow was the common thread. I said several times throughout the retreat that being a part of IFG has me truly excited for the future of my firm.”

“Our focus this year was climbing the entrepreneurial ladder,” Bridgers said. “This is important because the advisors in the room are not only working with clients and providing professional financial advice and investment management services on a daily basis, but they are also running their own independent businesses. I do believe this retreat is going to have a huge impact on their businesses going forward.”

BUILDING A BETTER BUSINESS

Integrated Financial Group is a consortium of advisors that function under the LPL Financial umbrella, and two of the keynote speakers are either current or former LPL executives: Dan Arnold, President and CEO of LPL, and Andy Kalbaugh, Former Managing Director and Divisional President of National Sales at LPL. One of the themes of the retreat was the importance of having an entrepreneurial mindset as an independent advisor, and both discussed in their sessions how their experiences as entrepreneurs and business leaders helped them build LPL into what it is today.

Dan Arnold shared what he learned throughout his career as an entrepreneur, and how even after becoming an executive in a corporate environment, he still thinks of himself as an entrepreneur. In addition to sharing the steps to becoming a successful entrepreneur, his keynote session focused on the value of building a strong team of people on which you can rely, the importance of delegating to and empowering those around you, the significance of identifying the right technology and tools to support a financial advisory practice, the importance of maintaining a human element and personal touch in addition to the technology, and the strong desire of LPL to help independent advisory business owners on their entrepreneurial journey.

Marie Swift and Andy Kalbaugh also shared their entrepreneurial and business leadership journeys. Swift, who focused her presentation on providing business development strategies and credibility marketing ideas for the group, also called on a handful of advisors in the audience to share their insights as a part of her “Marketing That Works for Advisors Today: Tales from the Trenches” theme. Kalbaugh, who participated in more of a fireside chat format with Land Bridgers, shared war stories and tips for being more productive and building a better business.

GIVING BACK AND MAKING A DIFFERENCE

Another highlight of the retreat was a keynote presentation from Lex Stolle, a 12-year-old cancer survivor turned motivational speaker. Stolle shared the journey he has been on since he was diagnosed with cancer about two and a half years ago – and that the Friday before the IFG Retreat he was able to finally “ring the bell”, meaning he had finished his cancer treatments. One of his biggest takeaways was “to live in the moment” and “be present where you are.” “Plan for the future, but don’t miss out on what’s happening right now,” he said, “and most importantly, never give up.” At the conclusion of his presentation, IFG presented him with a \$5,000 check – a donation to the [Rally Foundation for Childhood Cancer Research](#).

“Believe it or not, only about 3-4% of cancer research funding goes to childhood cancer,” said Bridgers. “These innocent kids never did anything in their lives that led to them having cancer, but surprisingly not a lot of research or funding goes into pediatric research. Foundations and organizations like the Rally Foundation have started to change that, and we couldn’t be happier to provide this donation to them in Lex’s honor.”

ABOUT INTEGRATED FINANCIAL GROUP

Integrated Financial Group (IFG) is a consortium of independent financial planners dedicated to leading the fiduciary standard for investment and wealth management. On a day-to-day basis, IFG's distinctive culture encourages members to collaborate and share ideas. It's called the Brain Trust, where the wisdom and experience of tenured advisors integrate with fresh, new insights from younger ones. Since 2003, IFG has fostered this environment and, at the same time, offered premium business support services, regulatory compliance oversight, business consulting, advisory marketing, and professional coaching to help advisors reach their full potential. To learn more, visit www.Integrated-Financial-Group.com.

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