



IFG RETREAT 2026

Lights. Camera. Learn.

WWW.IFGRETREAT.COM



Welcome

Dear IFG Family,

Welcome to the 2026 IFG Annual Retreat! We're thrilled to have you join us for what promises to be one of our most engaging and inspiring gatherings yet. This year's theme, **"Lights, Camera, Learn: Your Peers in Action,"** celebrates the power of shared experience and the incredible insight that comes when advisors learn from one another.

At IFG, our greatest strength has always been the **Brain Trust**, a collective wisdom, creativity, and generosity among our advisor community that enables us to share with one another. This retreat is built entirely around that idea. The sessions, panels, and discussions you'll experience over the next few days have been designed by advisors, for advisors. Your peers have stepped into the spotlight to share what has worked in their businesses, what challenges they've overcome, and what continues to drive their success.

Just as every great film draws strength from the collaboration of writers, directors, actors, and crew working together toward a shared vision, IFG members thrive when we share ideas, tools, and stories. Each of you brings a unique perspective, and this retreat offers you the opportunity to learn, contribute, and connect in ways that elevate us all.

We hope you'll take full advantage of the time together: ask questions, exchange ideas, and engage deeply in every conversation. The relationships and lessons that come from this experience are what make the IFG community truly special.

Thank you for your partnership, engagement, and dedication to helping each of us improve. Now it's time to roll the cameras, learn from your peers, and enjoy the show!

Grateful,

Land, Don & Andrews



Huntsville, AL

Oak Tree Financial Services

Ron Moody, CFP®, CRPC®
Brian Moody, CPA, MAcc
Coulton Owens

Lakewood, CO

AFC Wealth Management Group

Matthew Carpinelli

Acworth, GA

Madison Financial & Associates

Robert Day
Justin Burgess
Greg Patton, CRPC®

Athens, GA

Highland Trust Partners

Mark Cross, AIF®
Chris Caldwell, CFP®, AIF®, CRC®, MBA
Amy Parrish, AWMA®
Will Divers, CTFA
Ben Butler, CFP®
Rick Dawson
Bob Cowser
Creston Maxey

Atlanta, GA

Integrated Financial Group

Danny Bell, CRPC®
Steve Callahan
Kevin Garrett, AWMA®, CFS™
Melanie Rodrigue, CFP®, CLTC®
Donald Patrick, MBA
Paul Peeler, Jr.

Binford Wealth Planning

Moreland Bell

Financial Strategies Group

Nicholas Rios

Gary Alpert Financial Strategies

Gary Alpert, CFP®
Evan Bethards

Gaynes Financial Services, Inc.

David Gaynes, CFP®, ChFC®, CFS™
Steve Reents, CFP®
Andrew Colascione, CFP®
Cindy Skaggs, CFP®

Healy Wealth Management

Kathy Healy, MBA, CFP®
John Healy, CFA, MBA

Integrated Wealth Strategies

Richard Lombardi

Irvin Financial Planning

Michael Irvin, CFP®

Karen Lee & Associates

Karen Lee, CFP®, CLU®, ChFC®, MSFS
Daniel Lee
Jessica Callahan

Linea Private Wealth Management

Howard Katz, CFP®
Justin Davidson, AWMA®
Pete Coleman

Marathon Financial Strategies

Wesley Littlejohn, CFP®, CPA

Pathway Financial Partners

Troy DeCastro, CFA®

Searcy, Weems-Scott & Quinn

Connie Weems-Scott, MSFS, CFP®
Brian Quinn

Stevens Wealth Strategies

Mark Stevens

Tarrant Financial Advisors

Mike Tarrant, CFP®

Wealth Horizon, Inc.

Jerrí Hewett Miller, CFP®, CDFA, RICP, BFA
Daniel Miller

Wealthstead Financial

Jason Walker
Scott Braswell
John Hydrick, CFP®
Gregory Hyde

Blairsville, GA

Appalachian Wealth Management

Melissa Ekeberg
Chase Gunter

Brunswick, GA

Stark Financial Strategies

Tom Stark

Buford, GA

Clear Blue Wealth

Sabrina Proano

Cartersville, GA

Nida Financial Group

Tommy Barnes
Derek Keeney
Daniel Keeney
Ben Subasic

Fayetteville & Stockbridge, GA

Integrated Financial Partners

Pat Hinchey, CFP®
Temp S. Davis, IV, MBA, CFS
Halie Gray, CFP®

Gainesville, GA

SGL Wealth Management Group

Shane Gaddy, CFP®
Kelly Lee, CFP®, MBA
Toby Anderson
Noah Shorr, CPFA™
Jessica Farr

Hiawassee, GA

Integrated Financial Group

Ryan Hood
Nick Shook

Johns Creek, GA

DH Christopher Wealth Management

Christopher L. Jones

Marietta, GA

The Anchor Financial Group

Tripp Mullen, CFP®

Milledgeville, GA

WHB Wealth Management Group, LLC

William Black



Peachtree City, GA

Cast Ahead Wealth Management
Brett Bringuel

Wealthstead Financial
Vladimir Nikitenko, CFP®
Rostislav Tkachenko

Roswell, GA

Clear Blue Wealth
Darrin Bearden

21 Goats Financial Planning
Alyson Burkett, CRPC®, CFP®

Magnolia Financial Group
Trenton J. Adams, CFP®
R. Mark Smith, LUTCF
Russ Wood

Savannah, GA

Live Oak Financial Services
Seth Kovensky, CFP®

St. Simons Island, GA

East Beach Wealth Solutions
Nathan Kohlhoff, CFA®, WMCP®

Suwanee, GA

Surefooted Wealth
Jake Sanders

Tifton, GA

Integrated Financial Group of South Georgia
Will Flowers
Camden Collins

Bradenton, FL

Integrated Financial Group
David Crew, MSFS, ChFC, CFS™

Fort Lauderdale, FL

Financial Strategies Group
Kim DeProspero, CFP®
Hank Cleare, CFP®
Christopher Rios, CFP®

Port Charlotte, FL

Fero Financial
Rebekah J. Fero, CFP®
Jeffrey Fero

Port St. Lucie, FL

Integrated Wealth Management Group
Dana Binsbacher, AAMS, AIF®, CEP, CRPC
Henry Binsbacher, CFP®, CPFA, RFC®

St. Augustine, FL

ThompsonBaker Financial, LLC
Alan Bratic, CFP®
Patrick Lamb

Annapolis, MD

Blue Heron Financial Group
Margaret Kosmerl, RFC, RICP, AIF®
Sarah Kosmerl, CFP®
Joanna St. Clair, RICP

St. Louis, MO

Integrated Financial Group - St. Louis
Denny Roodman, ChFC

Sachs Wealth Management

Jill Sachs, CFP®

Clayton, MO

Morris Shank Wealth Management
Morris Shank
Morgan Shank

Columbus, MS

Nickels Wealth Management
Bain Nickels, CFP®, CKA®
Tracey Bryan, CFP®, CKA®
Ernest Blackburn
Danette Starks
Spencer Reed, CPFA®

Natchez, MS

NWM Capital Advisors
Key Smith
Griffin Agent

Andrews, NC

Carver Capital
Richard Carver, CRPC®, RFC®

Concord, NC

Carolina Planning Consultants
Gerald G. Craig, CFP®, CLU, ChFC®

Goldsboro, NC

Collins Wealth Management
John Collins, CES, MBA
Tim Fail

Hickory, NC

Mosaic Capital Management
Michael D. Stokes, CPA, CFS™

Mooresville, NC

BluHawk Wealth Management
Greg Bennett, MBA
Austin Lytle

Raleigh, NC

Franklin Watkins Financial Group
John Franklin, CFP®
Eddie Watkins, CLU, ChFC

Winston-Salem, NC

Mosaic Capital Management
Josh Donley, CFP®, CLU, CFS™

Winston Wealth Management

Mickey Smith, MBA, CFP®

Hauppauge, NY

Coleman Financial Group
Katie Coleman, CFP®

Norwich & Rome, NY

Gunther Wealth Management
Austin Marx
Joe Gunther, CFP®, AIF®

Greer, SC

Highlands Wealth Group
Terrell Boone, CRPC®
Brad Williams, CFP®
Tim Bennett

Mauldin, SC

Pinnacle Wealth Management
Micah Valentine
Robbie Davis

Summit Wealth Strategies

Randy Chalmers, MBA





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Nicholas Rios

Financial Strategies Group | Sunrise, FL | 954-888-4680 | nick@FSGPlanners.com





Alzheimer's Update

Dear Consortium Members,

When I shared that we'd raised \$100,000 for the Alzheimer's Association, I was overwhelmed. Today, I'm writing with a full heart to tell you that together, we've now raised \$117,647.00.

This remarkable milestone reflects your generosity, your spirit, and your commitment to making a difference.

A heartfelt thank you to Deb Mazza – Scanlon Family & Friends, Karen Lee and Associates & Friends, Financial Strategies Group, Mark Smith, Highlands Wealth Group, Don Patrick, David Gaynes, Land Bridgers, Connie Weems-Scott, Mickey Smith, Mike Tarrant, Blue Heron Financial, and every person who gave what they could.

And to those who purchased my paintings and helped raise over \$40,000 for IFG ATL, thank you. Your generosity has given families more time, researchers more resources, and countless people more hope.

This fight against Alzheimer's is personal for all of us. Thank you for standing with me, for honoring those we've lost, and for fighting for those still here. Your compassion continues to move us closer to a world without Alzheimer's, and I am honored to be on this journey with you.

Regards,

Eve Patrick, Silver National Team Coordinator



The Executive Team



Land Bridgers

Chief Executive Officer

Call me at 770-353-6373 for business development, coaching and strategic business planning.



Don Patrick, MBA

Founder & Chief Strategy Officer

Call me at 770-353-6317 for strategic planning insights, advisor development, and strategic business planning.



Andrews Browne, MBA

Chief Advisor Development Officer

Call me at 803-371-2577 for advisor development, strategic planning, and when you need an advocate at LPL.



Amy Harris

Executive Assistant to CEO

Call me at 770-353-6473 when you need to get on Land's calendar.



Ramey Hensley

Executive Scheduler

Call me at 770-353-6375 if you need to schedule and coordinate appointments with any of our executive team members.



Advisor Development



Don Patrick, MBA

Founder & Chief Strategy Officer

Call me at 770-353-6317 for strategic planning insights, advisor development, and strategic business planning.



Andrews Browne, MBA

Chief Advisor Development Officer

Call me at 803-371-2577 for advisor development, strategic planning, and when you need an advocate at LPL.



Hayes Laughlin

Executive Assistant to the Chief Advisor Development Officer

Call me at 770-353-6426 when you need to get on Andrews's calendar, have questions or need an advocate at LPL.





Karen Cooke-Thomas

Director of Operations & Human Resources

Call me at 770-353-6438 if you have questions about Human Resource Management, Group Benefits, Payouts, Advisor Support.



Laura Stone

Assistant Director of Operations & Director of Annual IFG Retreat

Call me at 770-353-6395 if you have questions on Retreat questions, bi-weekly payroll, and when you cannot reach Karen.



Dana Wilson

Executive Assistant to Operations

Call me at 770-353-6401 if you have questions on IT tickets, vendor relations, and daily office operations.



Patsy Galfas

Internal Accounting Associate

Call me at 770-643-6100 for questions about IFG's bookkeeping, to update financials, process payouts, or to help prepare invoices.



Naeem Seifden

Client Ambassador

Call me at 770-353-6400 if you have general operations questions, need to reach the IFG front desk, or need a liaison with service vendors for office upkeep.





Brice Silver

Director of Advisor Solutions

Call me at 770-353-6324 for questions or feedback regarding any of the programs under Advisor Solutions, all the capabilities and operations, or any general questions that you may have.



Ulanda Sutherland

Executive Assistant to Advisor Solutions

Call me at 770-353-6454 if you have general questions for Advisor Solutions or need to get on Brice's calendar.





Carmen Schuck, FPQP®

Client Services Senior Team Lead

Call me at 770-353-6450 with any feedback about ASAP, questions about Redtail/ClientWorks, or assistance transitioning your book of business to LPL.



Greg Cobb

Client Services Team Lead

Call me at 770-353-6456 with any feedback about ASAP, have questions about Redtail/ClientWorks.



Kim Powers

Client Service Associate

Call me at 770-353-6452 for client service support.



Carrie Wilson, AWMA®

Client Service Associate

Call me at 770-353-6453 for client service support.



Chrystal Blue

Client Service Associate

Call me at 770-353-6455 for client service support.





Liz Thomas

Client Service Associate

Call me at 770-353-6451 for client service support.



Samantha Mitchell

Client Service Associate

Call me at 770-353-6460 for client service support.



Rosa Bonnet

Client Service Associate

Call me at 770-353-6461 for client service support.



Elizabeth Welsch

Client Service Associate

Call me at 770-353-6459 for client service support.





Juval Pryce

Investment Solutions Team Lead

Call me at 770-353-6325 if you have questions on trading, trade support, rebalancing, analytics, or if you can't reach Brice.



Peyton Prince

Senior Trading Assistant

Call me at 770-353-6326 if you have questions on trading, trade support, rebalancing, analytics, or if you can't reach Brice and Juval.



Sam Hunt

Trading Associate

Call me at 770-353-6323 if you have questions on trading, trade support, rebalancing, analytics, or if you can't reach Brice, Juval, and Peyton.



Edward Resendez

Trading Administrative Assistant

Call me at 770-353-6322 if you have questions on trading, trade support, rebalancing, analytics, or if you can't reach Brice, Juval, Peyton, and Sam.





Jason Bokina

Director of Marketing & Communications

Call me at 770-353-6398 to kickstart your marketing, branding, and video projects, or to get a second opinion on another vendor or service.



Jenni Donovan-Rios

Marketing & Content Strategist

Call me at 978-866-8494 for marketing projects and Go Package support.





Crystal Epstein, AIF[®], IACCP[®]

Chief Compliance & Risk Officer

Call me at 770-353-6331 if you have questions on industry rules and regulations (SEC, FINRA, State, DOL, etc.), LPL and IFG Advisory policies, 401k fee-based business, advisor or staff onboarding, or need assistance with client complaints.



Laurel Resendez

Director of RIA Compliance

Call me at 770-353-6358 if you have questions on IFG Advisory policies, Hybrid/IFA registrations, and audits, IFA Marketing/Advertising, or need assistance with reporting personal holdings.



Teresa Kihara

Compliance Associate

Call me at 770-353-6330 if you have questions on LPL policies or need assistance with blotters.



Zehavit Kaidar-Heafetz

Administrative Assistant to Compliance Department

Call me at 770-353-6336 if you need to schedule a meeting with a team member or need assistance with IFG DocuSign and Orion Compliance.





Land Bridgers

Chief Executive Officer

Call me at 770-353-6373 for business development, coaching and strategic business planning.



Cooper Welch

Business Development Associate

Call me at 770-353-6419 for business development, referrals, and networking opportunities.



Thursday - January 15, 2026

THE PREMIER

Showtime	Scene	Set
12:00 PM - 12:30 PM	Pick up Tickets at Will Call	Ballroom Prefunction
12:30 PM - 1:10 PM	Opening Act: Retreat 2026 Kickoff Land Bridgers	Grand Ballroom
1:10 PM - 2:00 PM	Session: Through the Client's Eyes Land Bridgers, Paul Peeler & Clients	Grand Ballroom
2:00 PM - 2:30 PM	Intermission: Meet the Sponsors	Ballroom Prefunction
2:30 PM - 3:30 PM	Sponsor Speed Networking	Grand Ballroom/Concourse/Mercer
3:30 PM - 3:45 PM	Intermission	
3:45 PM - 4:15 PM	Session: In the Spotlight John Franklin, Eddie Watkins, Andrews Browne	Grand Ballroom
4:15 PM - 5:15 PM	Take 1: Financial Planning Workshop	Grand Ballroom/Concourse/Mercer
6:00 PM - 7:00 PM	Happy Hour with Jump	SAVOR Bar
7:00 PM	Dinner/IFG Consorties Award/Stewardship Award Presentation	

Friday - January 16, 2026

THE FEATURE PRESENTATION

Showtime	Scene	Set
7:30 AM - 9:00 AM	Sponsor Breakfast	SAVOR Bar & Kitchen
9:00 AM - 10:00 AM	Take 2: Financial Planning Workshop	Grand Ballroom/Concourse/Mercer
10:00 AM - 10:30 AM	Intermission: Meet the Sponsors	Ballroom Prefunction
10:30 AM - 11:15 AM	Session: Inside the Advisor Studio Kim DeProspero, Josh Donley, Bain Nickels, Crystal Epstein	Grand Ballroom
11:15 AM - 12:00 PM	Lunch	
12:00 PM - 1:00 PM	Main Act Emi Gragnani, Senior Director of Culture at Chick-fil-A, Land Bridgers	Grand Ballroom
1:00 PM - 1:15 PM	Intermission	
1:15 PM - 2:15 PM	Sponsor Speed Networking	Grand Ballroom/Concourse/Mercer
2:15 PM - 2:45 PM	Intermission	
2:45 PM - 3:45 PM	Backstage Pass: Meet the Experts 1	Grand Ballroom/Concourse/Mercer
3:45 PM - 4:15 PM	Intermission: Meet the Sponsors	Ballroom Prefunction
4:15 PM - 5:15 PM	Backstage Pass: Meet the Experts 2	Grand Ballroom/Concourse/Mercer
5:15 PM - 5:30 PM	That's a Wrap! Land Bridgers	Grand Ballroom
6:00 PM - 7:30 PM	Happy Hour with Wealthbox	SAVOR Bar
7:30 PM - 10:00 PM	Dinner + Live Karaoke	Grand Ballroom/Concourse/Mercer

Saturday - January 17, 2026

THE ENCORE

Showtime	Scene	Set
9:00 AM - 11:00 AM	After Party with the Cast: Open Forum Breakfast Land Bridgers, Andrews Browne, Don Patrick	Bernstein I & II



LIGHTS
CAMERA
LEARN

Your peers in ACTION!



Who we are.

IFG Vision

To be known as the premier destination for elite financial planners and business leaders, of which only 5% are qualified to join. All Consortium members will feel connected, whether down the hall or across the country. We will protect our culture at all costs while we will help every member reach their full potential. In turn, they will impact their family, clients, and community. Our environment of service, hard work, and fun will permeate all our relationships.



IFG Mission

Maintain a greater than 97% retention rate through 2027



IFG Purpose

To help advisors reach their full potential.



What we value.

Independence

We always fight for choice and independence. We know ultimate freedom is being a business leader.

The Brain Trust

We know many minds are greater than one, always improving and growing together.

Leadership

We lead by serving, delivering what we promise, making participative, common-sense decisions, and providing clear, frequent, and transparent communications.

Learning & Development

We know success comes from a dedication to a lifetime of learning and development.

Profit

We know profits are the fuel for growth, sustainability, and making a powerful, positive impact for our IFG members, their clients, and our team members.

Integrity

We always conduct ourselves in such a way as to bring honor to our family, clients, associates, team members, friends, and our firm.

The Golden Rule

We treat others the way we want to be treated.

Potential

We are in a place where potential is realized.

Service

We deliver more than we promise.

Work & Play

We are fun place to work, where we work hard and play hard with people we like and who have similar values and beliefs.



Stronger, together.



13
STATES



2500+
YEARS COMBINED
EXPERIENCE



71
TEAMS



10
MASTERMIND
GROUPS



\$8.6+
BILLION IN
COMBINED ASSETS



2003
IFG WAS
FORMED

Organizational Strength

- We have 116 advisors, and 71 teams located in 13 states.
- Highest Net Promotor Score (NPS) at LPL for Large Enterprise Groups.

Years of Experience

- The Brain Trust's experience totals over 2500 years with an average of 22.6 years of experience per advisor.

New Members & Teams

- We added 4 new teams in 2025 totaling \$340MM.

Connecting in 2025

- 4 Simplified Business Planning Meetings
- Mastermind Groups
 - Advisors – 8
 - Associate Advisors/Paraplanners – 2
 - Operations Managers – 1
- Assistant's Best Practices Forum
- Annual Retreat



New members.

Randy Chalmers, MBA

Summit Wealth Strategies, Mauldin, SC



New members.

Katie Coleman, CFP®

Coleman Financial Group, Hauppauge, NY



COLEMAN
FINANCIAL
GROUP



New members.

Nathan Kohlhoff, CFA[®], WMCP[®]

East Beach Wealth Solutions, St Simons Island, GA



New members.

Jake Sanders, CFP[®], BFA[™]

Surefooted Wealth, Suwanee, GA



New members.

Tim Bennett

Highlands Wealth Group, Greer, SC



HIGHLANDS
— WEALTH GROUP —



New Advisors Joining Teams.



Joanna St. Clair

Blue Heron Financial Group, Annapolis, MD



Nick Shook

IFG, Atlanta, GA



Bob Cowsert

Highland Trust Partners, Athens, GA



Creston Maxey

Highland Trust Partners, Athens, GA



Ben Subasic

Nida Financial Group, Cartersville, GA



Coulton Owens

Oak Tree Financial Services, Huntsville, AL



Erick Murray

Healy Wealth Management, Atlanta, GA



New IFG Support Team.



Naeem Seifden

Client Ambassador, Executive Team



Elizabeth Welsch

Virtual Assistant, Executive Team



Amy Harris

Executive Assistant to CEO, Executive Team



Growing revenue together.

Revenue Growth

2003 - 2025

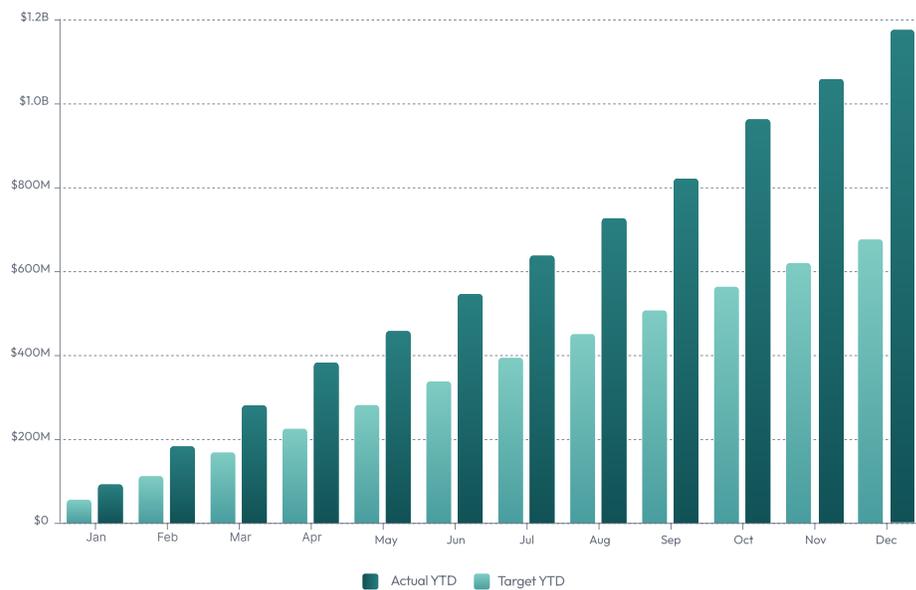


Starting Revenue in 2003
\$3.7M

Current Revenue in 2025
\$83M

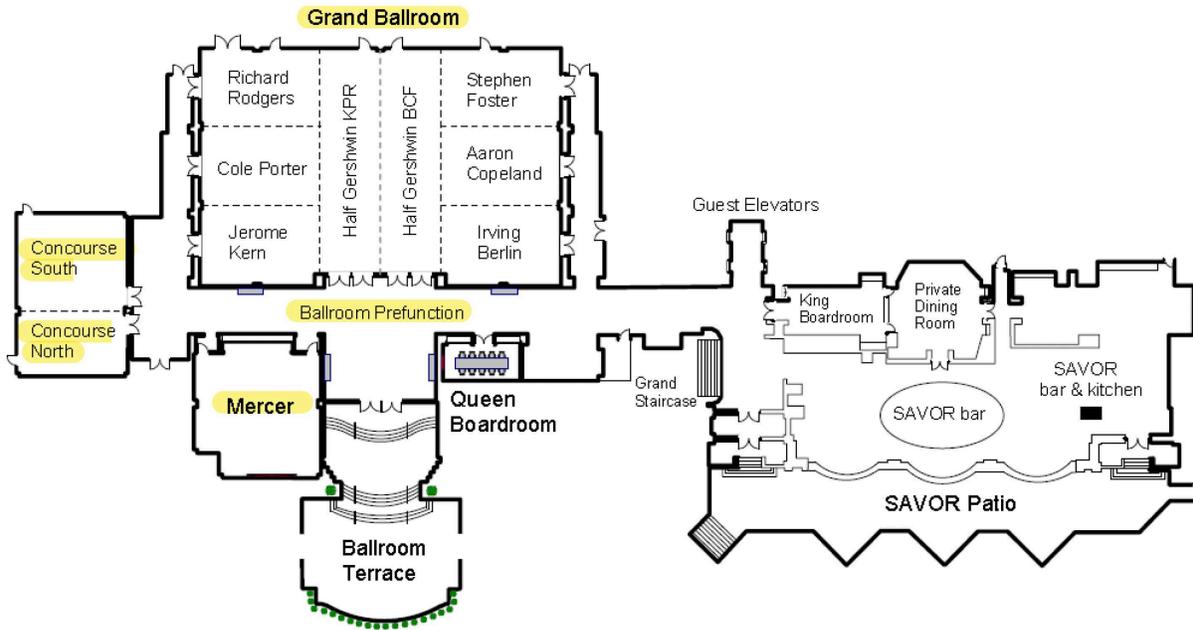
New AUM vs Targets

2025 Year-to-Date Comparison

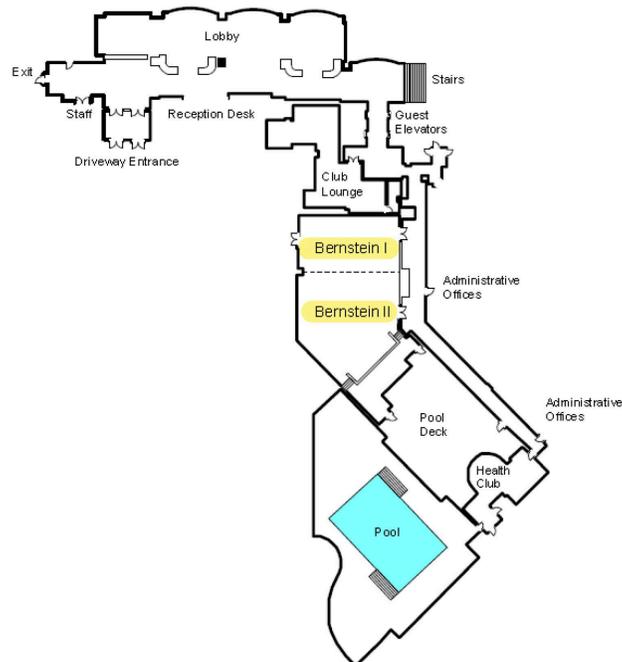


The Venue

Meeting Room Level



Reception Level



Retreat Sponsors



Advisors Capital Management

Judd Lasater | 615-720-1613 | Judd.Lasater@advisorscapital.com

Delaware Life

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Dimensional Funds

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Eagle Life

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Fidelity

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First Eagle

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Jump

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Lincoln Financial

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T. Rowe Price

Nick Duran | 763-310-9020 | nick.duran@troweprice.com

Wealthbox

Jy Corbett | 401-386-7959 | Jy.Corbett@wealthbox.com

The Main Act.



Emi Gragnani

Senior Director of Culture, Chick-fil-A

Emi Gragnani is Sr. Director of Culture at Chick-fil-A, Inc. In this role, Emi leads the culture team as they focus on stewarding and strengthening Chick-fil-A's unique culture. Prior to this role, Emi spent 4 years in Organizational Planning facilitating the development of the Chick-fil-A's annual plan and 14 years in the Marketing Department leading various teams including Local Marketing and Kids & Family Marketing. She began her Chick-fil-A career on the Sponsorships and Event Marketing team overseeing their partnerships with the ACC and SEC Conferences.

Emi is an Atlanta native and earned a B.A. in Psychology and Communications from UNC - Chapel Hill. At Carolina, she graduated Phi Beta Kappa and was captain of the Varsity Women's Tennis Team. Upon graduation, she worked at Turner Broadcasting before attending Emory University's Goizueta Business School, where she received an MBA with a Marketing concentration.

Emi currently resides in Atlanta with her husband, Michael, and their three boys. She enjoys teaching Sunday School at All Saints' Episcopal Church, serving on various community boards, and volunteering at The Westminster Schools. Her hobbies include playing tennis and spending time on the sidelines cheering on her boys in their various activities.



Director's Notes



What are your top 3 takeaways from the retreat this year?

1

2

3

Allowable Expenses

Retreat Travel is reimbursed up to \$300 for **out-of-state advisors**.

Please submit receipts to the Retreat Inbox at retreat@intfingroup.com.

Hotel rooms for advisors are covered for Thursday and Friday evenings. Spouses and guests are welcome; however, due to FINRA rules, all guest meals must be paid for by the advisor.

Expense	Paid By
Thursday & Friday Hotel Room – Advisor	Sponsor
Thursday & Friday Hotel Room – Guest	Advisor (FINRA requirement)
Thursday Dinner – Advisor	Sponsor
Thursday Dinner – Guest	Advisor (FINRA requirement)
Friday Lunch Advisor	Sponsor
Friday Dinner Advisor	Sponsor
Friday Dinner – Guest & Assistant	Advisor (FINRA requirement)

