



EQUIPPED

BRIDGING THE GENERATIONAL GAPS

2025

THEME

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 mankind reach their full potential.

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 a place where potential is realized.

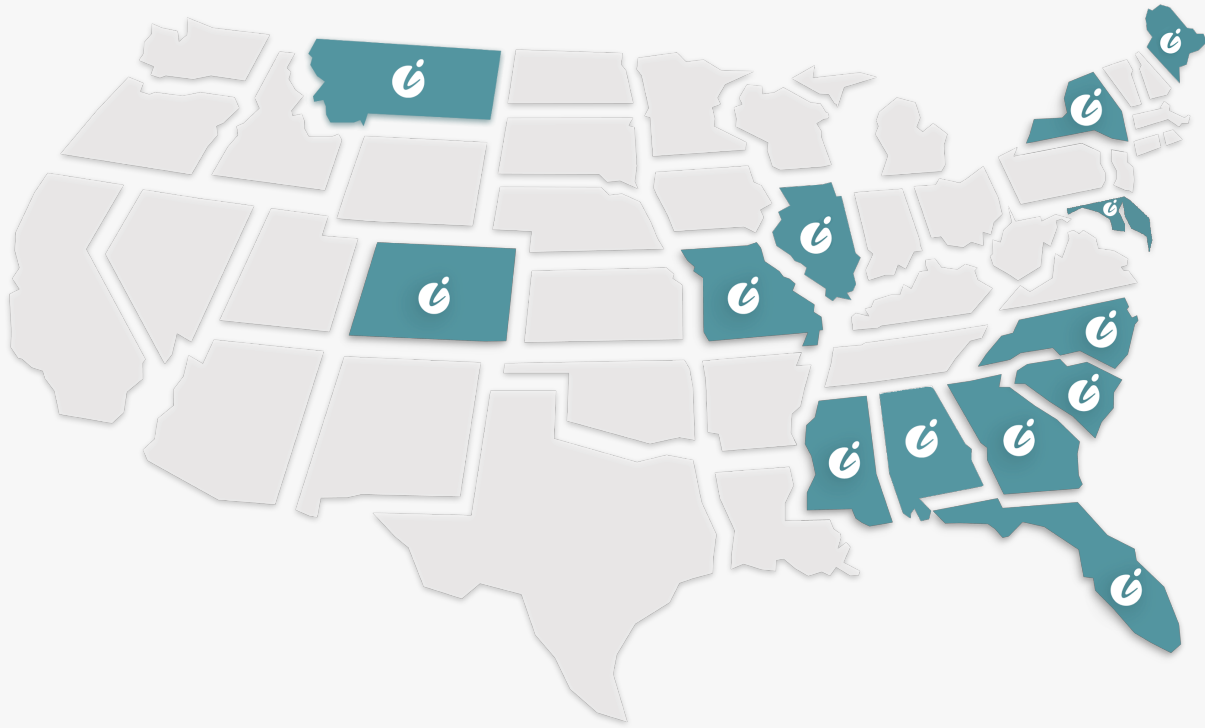
SERVICE

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.

STATE OF THE CONSORTIUM 2025



ORGANIZATIONAL STRENGTH

- We have 116 advisors, and 68 teams located in 13 states.
- 97% of our advisors would recommend IFG to an outside advisor



YEARS OF EXPERIENCE

The Brain Trust's experience totals over 2387 years, and the average years of experience per advisor is 22.3.



NEW MEMBERS & TEAMS

We added 5 new advisor teams in 2024, totaling \$840MM in new AUM.



CONNECTING IN 2024

- 4 Simplified Business Planning Meetings
- Mastermind Groups
 - Advisors – 7
 - Associate Advisors/Paraplanners – 2
 - Operations Managers – 1

STRONGER

TOGETHER



NICKELS
W E A L T H

Bain Nickels, CFP®, CKA®
Tracey Bryan, CFP®, CKA®
Ernest M. Blackburn
Danette W. Starks



Melissa Ekeberg, AIF ®
Chase Gunter



Melanie Kohler, CFP®



Wealthstead
FINANCIAL ADVISORS

Jason Walker
Vladimir Nikitenko, CFP®
Scott Braswell
John Hydrick, CFP®
Rosty Tkachenko

NEW ADVISORS JOINING TEAMS

Patrick Lamb

ThompsonBaker, LLC., St. Augustine, FL

Fredrick Dawson

Highland Trust Partners, Athens, GA

NEW IFG SUPPORT TEAM

Angel Amore

Client Service Associate, Hayesville, GA

Samantha Mitchell

Client Service Associate, Auburn, GA

Rosa Bonnet

Client Service Associate, Port St. Lucie, FL

Edward Resendez

Trading Assistant, Atlanta, GA

Hayes Laughlin

Executive Assistant to Director of Advisor Solutions, Atlanta, GA

Cooper Welch

Business Development Associate, Atlanta, GA

Teresa Kihara

Compliance Associate, Atlanta, GA

Ulanda Sutherland

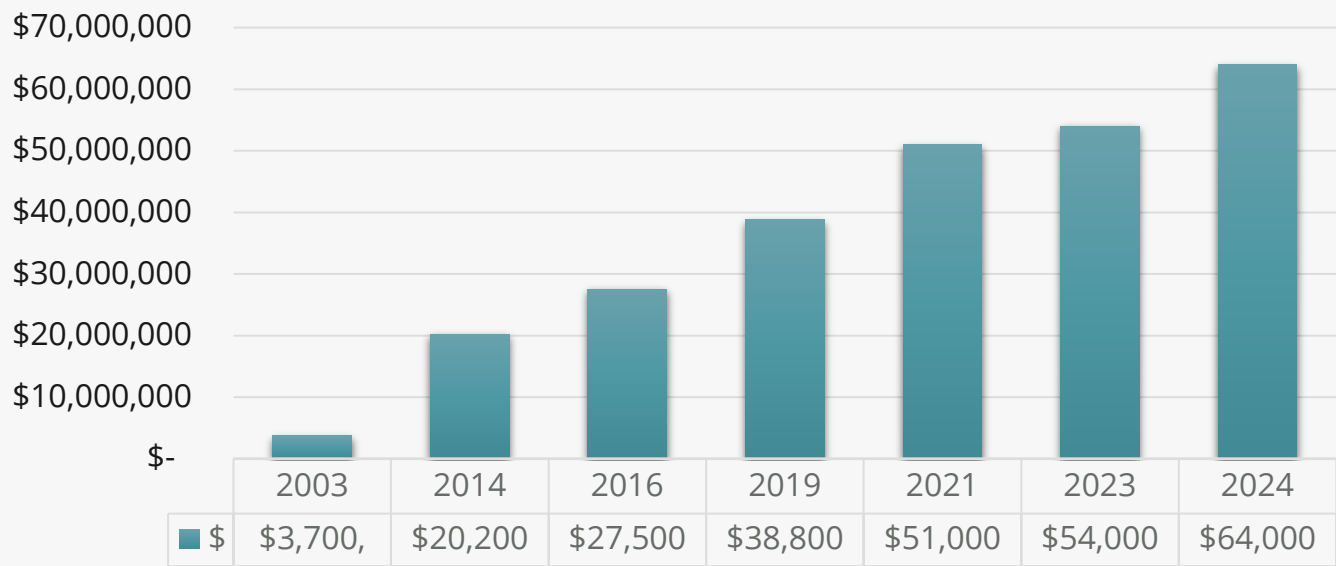
Client Ambassador, Atlanta, GA



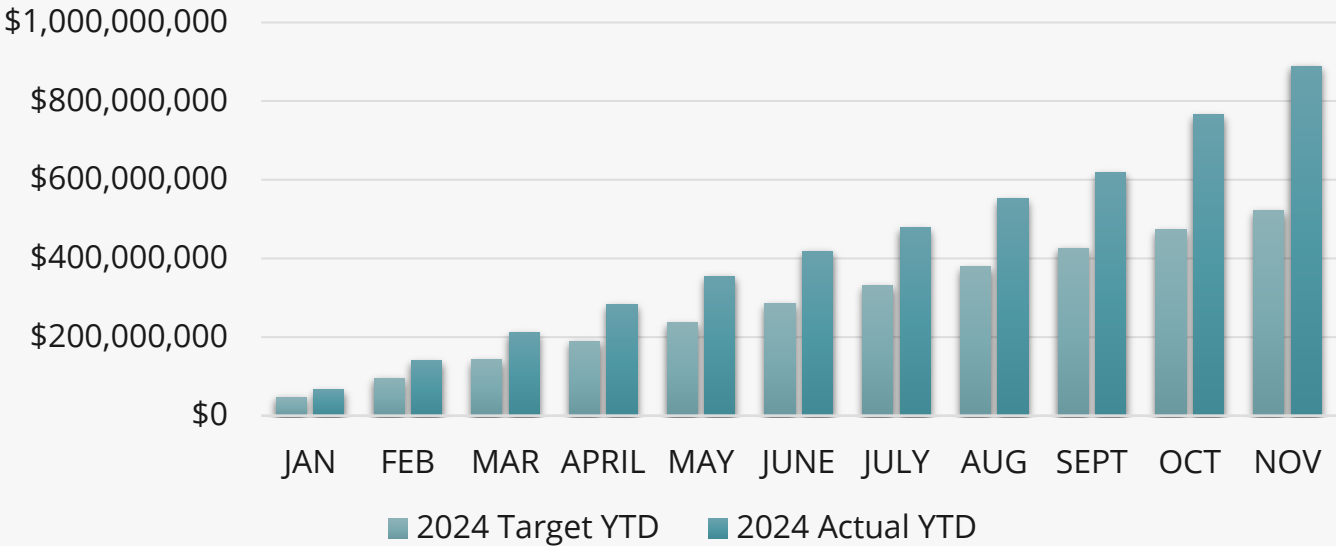
NEW

MEMBERS

TOTAL FIRM GDC



NEW ASSETS V. TARGETS



FIRMS OWNED BY AN INDIVIDUAL BY REVENUE

1	Rich Lombardi	Integrated Wealth Strategies, Atlanta, GA
2	David Gaynes, CFP®, ChFC®, CFS™	Gaynes Financial Services, Atlanta, GA
3	Margie Kosmerl, RFC, RICP, AIF®	Blue Heron Financial Group, Annapolis, MD
4	Karen Lee, CFP®, CLU®, ChFC®, MSFS	Karen Lee & Associates, Atlanta, GA
5	Morris Shank	Morris Shank Wealth Management, St. Louis, MO
6	Gerald Craig, CFP®, CLU, ChFC®	Carolina Planning Consultants, Concord, NC
7	John Collins, MBA, CES	Collins Wealth Management, Goldsboro, NC
8	Matt Carpinelli	AFC Wealth Management Group, Lakewood, CO
9	Mike Tarrant, CFP®	Tarrant Financial, Atlanta, GA
10	Josh Donley, CFP®, CLU, CFS	Mosaic Capital Management, Winston-Salem, NC

TEAMS BY REVENUE

1	Natchez Wealth Management	Natchez, MS
2	Strong Gaddy Lee Wealth Management	Gainesville, GA
3	Nickels Wealth Management	Columbus, MS
4	Highland Trust Partners	Athens, GA
5	Financial Strategies Group	Sunrise, FL
6	Integrated Financial Partners	Fayetteville, GA
7	Magnolia Financial Group	Roswell, GA
8	Healy Wealth Management	Atlanta, GA
9	Linea Private Wealth Management	Atlanta, GA
10	Nida Financial Group	Cartersville, GA

STATE OF THE CONSORTIUM 2025

TEAM

1	Highland Trust Partners	Athens, GA
2	Highlands Wealth Group	Greer, SC
3	IFG of Mississippi	Ridgeland, MS
4	Franklin Watkins Financial Group	Raleigh, NC
5	Pinnacle Wealth Management	Mauldin, SC
6	Gunther Wealth Management	Kalispell, MT/ Norwich, NY
7	Integrated Financial Group of South Georgia	Tifton, GA
8	Financial Strategies Group	Ft. Lauderdale, FL
9	Karen Lee and Associates	Atlanta, GA
10	Integrated Financial Partners	Fayetteville, GA



TOP 10

TEAM GROWTH BY AUM