

FOR IMMEDIATE RELEASE

May 5, 2016

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Independent Financial Group Continues Expansion of Wealth Management Platform

San Diego, CA – Independent Financial Group, LLC (IFG) has recently announced several changes to their Wealth Management platform to include additional advisory consultant resources, reduced advisory program minimums and the optimization of the firm's technology chassis, AccessPoint through its partnership with Envestnet.

“Very few independent broker-dealers offer what we do,” explains Kian Rafia, Senior Vice President of the firm's Wealth Management division. He continues, “Sure, we have the resources to assist advisors with case consultation, book of business analysis and guidance regarding the most suitable investment platform, but we have franchised the ability to understand our advisors' needs at a deeper level and introduced products with low account minimums.” He explains, “We believe that significant amount of assets are in play and eligible to be shifted from transaction oriented relationships into lower priced advisory investment products, as we consider the DOL Fiduciary rule. We further believe that passive and low-cost investment vehicles will set a standard against which many advisers' decisions are measured. As firms demonstrate that they are acting in their clients' best interests, those with variable compensation structures will face challenges. As a result we are introducing advisory products, that are well diversified and suitable for smaller account minimums.” He concludes, “Our process and software improvements as it relates to client acquisition and reporting are just a few ways that we are enabling our advisors to scale their wealth management practice.”

About Independent Financial Group, America's Finest Broker-Dealer®

Independent Financial Group, LLC serves the needs of independent financial advisors nationwide. Renowned for their first-class customer service, the company specializes in individual wealth management and institutional retirement plan solutions for their financial advisors. IFG's corporate office now supports over 600 independent registered representatives across the country. Their notable success has been recognized in numerous financial services industry publications including Financial Planning, Financial Advisor and Investment News. For the past two years, IFG has ranked in the Top 50 of Financial Planning's Annual Broker-Dealer Survey. Most recently, the company was honored by its advisors ranking them among all broker-dealers, #3 in Total Satisfaction, as reported in Wealth Management's Broker-Dealer Report Card and has additionally earned the #39 position in this year's Broker-Dealer Ranking as featured in Financial Advisor Magazine. IFG has also gained nationwide recognition with Inc. Magazine's Honor Roll status for multiple consecutive mentions on their annual Inc.500|5000 list. For more information on IFG, please visit www.ifgsd.com.

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