



Financial Strategies for Life's Transitions

Solving your clients' financial challenges during exciting and difficult moments.

You work tirelessly to preserve your clients' financial futures, but sometimes, a comprehensive approach requires a specialist.



Your Trusted Wealth Building Partner

We understand the complexities facing professionals like you and your clients. With our distinct focus on risk management, tax reduction strategies, and generational wealth preservation, we offer a team approach and a mutually beneficial wealth management partnership that extends beyond investments.



Our Value

Our expertise lies in the following areas:

Risk Management Insight | Assessing your clients' overall financial pictures, we'll identify potential risks and develop strategies that aim to preserve their assets.

Estate Planning Expertise | With a focus on generational wealth transfer, we work closely with estate planning attorneys so your clients' legacies endure according to their wishes.

Tax-Savvy Solutions | We'll provide diversified tax strategies that aim to minimize your clients' tax burden while optimizing their wealth*.

Elder Planning Champion | Advocating elder planning issues, particularly long-term care needs, Chris assists you and your clients in navigating these complex situations.



Client Experience

Our team is dedicated to providing a seamless experience for you and your clients.

John Harrington | John Harrington is a well-established CERTIFIED FINANCIAL PLANNER™ practitioner who has dedicated his practice to helping individuals and business owners gain control of their financial future to pursue their long-term financial goals.

Patrick Eaker | As Client Relationship Manager, Patrick plays a pivotal role in providing exceptional service and seamless practice operations. With his meticulous attention to detail, he manages all aspects of our client relationships, from initial onboarding through ongoing account maintenance and trading execution.



Integrated's Deep Bench of Experts: A Powerful Advantage

Chris leverages the vast resources at our firm to provide a 360 approach to financial planning and wealth management.

Advanced Planning Team | Implementing the Lifetime Income Model™, our retirement experts create bespoke income strategies so your clients can enjoy their golden years with confidence.

Investment Team | Led by Integrated's Chief Investment Officer and a team of CFAs, we craft personalized portfolios that support your clients' goals and visions.

Professional Partner Program | Our nationally recognized alliance program fosters strong relationships with trusted professionals like you, so together we can provide comprehensive financial solutions for your clients.



Benefits for You

Enhanced Client Service | Offer your clients access to a comprehensive wealth management solution without the burden of becoming an expert yourself.

Streamlined Communication | Chris and his team work collaboratively with you to ensure your clients receive the best possible financial advice.

Increased Client Retention | By addressing all aspects of your clients' financial well-being, you contribute to their long-term success.

The first step is a conversation.

If this sparked your interest, simply call or email today to schedule a call.



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