



FOR IMMEDIATE RELEASE

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### **Independent Financial Group Aligns with Succession Resource Group**

PORTLAND, OR – Succession Resource Group, Inc. (SRG) is pleased to announce a new strategic partnership with Independent Financial Group (IFG), to expand the firm's existing contingency and succession solutions. The partnership will bring the outside expertise and resources of industry expert, Succession Resource Group, to the company's more than 600 IFG advisors worldwide.

The new alliance allows the advisors to leverage the internal expertise and knowledge of IFG's team with the resources of the industry's leading succession experts – Succession Resource Group. Beginning August 1, 2016, IFG advisors will have access to a co-developed package of resources designed specifically to help IFG advisors create turnkey and reliable plans to protect their clients and value in case of death, disability, or loss of license. David Fischer, Managing Director at Independent Financial Group explains, "Whether contingency plans become a compliance requirement or not – we understand the importance of proactive planning for our advisors and their trusted client relationships. In view of that, we decided to commit the resources to make it as easy as possible for our advisors to implement a plan. SRG brings the outside industry perspective and field tested resources we need to help our advisors."

Over the next five years, Independent Financial Group expects to have a written contingency plan on file for the majority of their advisors, and will have a back-up plan for those without something more formal. David Grau Jr., President of Succession Resource Group went on to say, "We work with spouses each month who have lost their advisor husband/wife and are trying to figure out what to do with the practice. Even with a plan in place, losing the advisor is never easy. With no plan, the loss is only compounded when the spouse finds out the family's most valuable asset is now effectively worthless. IFG's goal of having something in place with everyone should be the model for the industry."

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

Independent Financial Group, LLC (IFG) 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 three 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](http://www.ifgsd.com).

### **About Succession Resource Group**

Succession Resource Group, Inc. is a boutique succession consulting company specialized in helping financial professionals value, protect, merge and acquire, and develop exit strategies for their business. With decades of industry experience, SRG possesses a unique combination of skills, resources and expertise that allows them to help advisors understand the value of their business, develop strategies to improve that value, protect the value with comprehensive contingency and succession plans, and grow through acquisition.

For more information on Succession Resource Group visit <http://www.successionresource.com>

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