

VIEWS FROM THE EXPERTS

The Incredible Rise Of Independent Financial Group

A conversation with IFG's Founders Scott Heising, Joe Miller and David Fischer.

Q: We've seen IFG a lot in the news lately. Of all the accomplishments, which one are you the most proud of?

A: Nothing is more satisfying than knowing our advisors are happy here. We've consistently scored highly (last year #1 in overall rep satisfaction!) according to our reps themselves. We're not only succeeding financially but we're making a positive impact on the individuals we work so hard to support. That kind of reward is the most profitable.

Q: Take an existing independent rep looking to make a switch. Why choose IFG as their broker-dealer?

A: We know what advisors want and what a broker-dealer needs to do. We maintain a very personalized approach to service; carefully attuned to the needs of our advisors based on their individual practices as well as their personal goals. We've built a strong reputation based on relationships, one advisor at a time and this is a refreshing model compared to the total loss of independence we're currently seeing in the industry.

Q: IFG has caught up—surpassed in some instances, its competition. How have you accomplished this?

A: We continue to stay true to the fundamentals. We provide a down-to-earth and personalized approach to back office support and make sure our advisor needs always come first. The formula works for us and we're sticking to it.



From L to R: Scott Heising, Joe Miller and David Fischer.

Q: What does "Independence, Perfected" mean to the three of you?

A: It means we do business every day with you, the advisor, in mind coupled with a simple, consistent, common sense approach to business. We foster an environment free from quotas, bias, proprietary products, corporate influence. We keep an open line of communication with our advisors.

Q: What was your goal in starting a new broker-dealer?

A: We recognized the opportunity presented by the general disenchantment that advisors had with the rapidly consolidating independent broker-dealer space. Combined, we have nearly 90 years of experience and know our areas well—Scott—the entrepreneur and finance leader, Joe—the wise compliance and product expert and Dave—the recruiting and marketing genius. We stick to what we know and have combined our talents to build this powerhouse broker-dealer.



¹Ranked by Wealth Management Magazine's 2017 Independent Broker-Dealer Report Card

IFG's corporate office supports more than 650 independent registered representatives across the country, with 375 offices now in Puerto Rico and Israel. IFG has been named locally by the San Diego Business Journal as one of San Diego's Fastest-Growing Private Companies for the past several years. Their notable success has been recognized in numerous financial services industry publications. Independent Financial Group has also gained Inc. Magazine's Honor Roll status for multiple consecutive mentions on their annual Inc.500|5000 list.

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