



## **Integrated Partners Welcomes Konvergent Wealth Partners; Opens Seattle, WA, and Bend, OR Offices**

- *\$200M advisory team, formerly known as Hearthstone Wealth Management, joins Integrated from Ameriprise and is headed by Homer Smith and Dave Stuehling*
- *The firm has chosen Fidelity as their custodian of choice and will be focusing on serving business owners and clients with complex financial planning requirements*

**Boston, MA – November 13<sup>th</sup>, 2019** – [Integrated Partners](#), a national financial planning and registered investment advisory firm, is proud to announce that **Konvergent Wealth Partners**, a registered investment advisory firm based in Seattle, WA, is joining as the newest financial advisory firm to come aboard, and will focus squarely on expanding the firm’s business owner/family office services in addition to offering complex financial planning. Konvergent serves entrepreneurs and families with an advanced set of financial planning needs, offering deep-dive counsel and support.

The firm is led by partners Homer Smith and Dave Stuehling, longtime veteran advisors who have spent the better part of their careers at Ameriprise. After a thorough review of Integrated’s open, entrepreneurial support model, they chose Fidelity as custody partner.

In addition to executing upon his vision for growing Konvergent with Stuehling, Smith will assume responsibility for the Integrated Business Alliance’s western operations, which will involve coordinating the firm’s CPAs, advisors and assorted specialists in serving the complex needs of business owners.

Konvergent offers clients in need of complex financial planning and business support, the following core services:

- Wealth Enhancement – tax mitigation strategies and cash flow management
- Wealth Transfer – establishment of goals, gifting and estate planning strategies
- Wealth Protection – asset titling and insurance strategies to help you avoid the undue loss of assets
- Charitable Planning – helping clients give back to their communities and the world, wisely
- Business Counsel – working closely with owners to accelerate growth, and exit under optimal conditions

“We wanted a partner that understood our passion for helping business owners and families with complex financial challenges that go far beyond asset management,” **said Homer Smith, partner, Konvergent**. “In talking to Integrated, it was clear they do for advisory firm business owners precisely what we do for our clients – help them to solve complex growth challenges and offer a clear value-add. Not to mention that their Family Office and Business Alliance divisions share our passion when it comes to serving clients – we’re going to make a great team.”

**Dave Stuehling, partner, Konvergent, adds:** “This is an alignment of culture, process and people – we’ve been looking for the right partner for a long time, and we’re confident we’ve found one. This model is perfect for us, our clients and our growth aspirations – they get us. We are 100% independent, can tap the growth catalysts on offer as we see fit, and get all the benefits of a six-billion-dollar firm’s scale and resources.”

“When I founded the firm in 1996, I dreamed we would one day build an organization that offered independent advisors an un-matched opportunity to hone their core competencies while tapping into a



growth engine second to none,” said **Paul Saganey, founder and president, Integrated**. “And when advisors like Homer and Dave find synergies between their visions and ours and decide to partner with us rather than go it alone, I feel confident that we have indeed, built that organization.”

**Rob Sandrew, head of advisor recruiting, concludes:** “Homer and Dave will immediately add experience and value to our already well-established Integrated Family Office and Integrated Business Alliance units, while deploying these same resources to the growth of their own business. We’re honored to welcome them as teammates and partners.”

Integrated Partners is seeking highly motivated, growth focused, client-centric financial advisors and their teams to join a national financial planning and advisory firm. To learn more about our model, and whether or not you are a potential fit, please e-mail [robert.sandrew@integrated-partners.com](mailto:robert.sandrew@integrated-partners.com).

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### **About Integrated Partners**

Since 1996, Integrated Partners has been helping financial advisors to achieve their entrepreneurial vision. We offer comprehensive business building services, designed with the truly independent advisor in mind. With one hundred and forty-eight advisors, one hundred and twenty-seven CPAs and forty-three regional offices across the United States, and more than six billion in brokerage and advisory assets, Integrated has built our reputation advisor by advisor, client by client. Constructed and grown upon a foundation of empowerment, integrity and trust, we believe in the incredible power that financial advisors have to make a positive impact on people’s lives. Integrated supports advisors by offering a completely customizable open architecture business environment: technology, investment management, advanced planning, CPA partner program, family office platform, custody, marketing, public relations, M&A, succession planning and comprehensive business counsel.

**We believe in advisors. Let us prove it to you.**

*Investment advice offered through Integrated Partners, a registered investment advisor. Konvergent Wealth Partners, Integrated Financial Partners and Integrated Partners are separate entities. Konvergent Wealth Partners is also a DBA name of Integrated Partners and Integrated Financial Partners.*

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