



Integrated Partners Designated by the Massachusetts Society of CPAs as a Corporate Partner in Financial Services

- *The renowned MA Society of CPAs reserves the coveted designation for partner firms who have a history of working with its CPAs in a productive and value-added capacity*
- *In addition to being selected for inclusion in this elite group of partner firms, Integrated has continued to successfully expand its proprietary CPA Partner Program, which pairs CPA firms and financial advisory firms to offer comprehensive financial counsel to clients with complex needs*

Boston, MA – November 20th, 2019 – [Integrated Partners](#), a national financial planning and registered investment advisory firm, is proud to announce that it has been selected to join an elite group of companies from various industries as a corporate partner of the Massachusetts Society of CPAs (MSCPA). The [MSCPA's Corporate Partner Program](#) recognizes companies who have demonstrated a dedication to working in a high-value capacity with local CPAs, as well as a long commitment to pairing CPAs and financial advisors together to offer first-class financial counsel to business owners and high-net-worth families and individuals.

Among the top CPA firms working with Integrated Partners and its financial advisors nationwide are:

- [Alkon-Levine](#) led by Jeff Levine and Bob Alkon
- [LGA LLP](#) led by John Geraci
- [McGaunn & Schwadron, CPAs LLC](#) led by Mark McGaunn, CPA/PFS, CFP®

Additionally, 127 CPAs across the continental United States are part of Integrated's CPA Partner Program, which pairs CPAs with the right financial advisors and/or Integrated's specialized divisions such as the Integrated Business Alliance, the Integrated Family Office or the Advanced Financial Planning team. Integrated further synthesizes the relationship between advisor, client and CPA with its in-house marketing team called In Touch Innovations.

"Our CPA Partner Program has been one of our best-kept secrets for over two decades," **said Paul Saganey, founder and president, Integrated**. "CPAs often work with highly advanced clientele, such as business owners, and have a 360° view of their financial world. And while they can offer extremely valuable counsel, they stop short of execution when it comes to advanced financial planning, wealth management, estate planning and other vital financial considerations. They are always looking for trusted partners for their clients – we're proud to be that partner."

John Pastore, senior vice president, Integrated, adds: "We've treasured our relationship with these CPA firms, and have grown the program annually for many years with the help of Deirdre Collins and other fantastic individuals. So when a well-respected group like the MSCPA selects Integrated to join its Corporate Partner Program, it's a special feeling. We're humbled to be chosen and will continue to validate their choice week in and week out."

"Integrated Partners has been a supporter and valued part of our community for many years," **said Amy Pitter, president and CEO of the MSCPA**. "They have a passion for working with CPAs and provide a reliable resource for our members to turn to when they have clients in need of highly experienced financial



counsel. We are very pleased to welcome them to this select group of partner companies across different industries.”

John Geraci, managing partner, LGA, concludes: “We’ve been working with Paul Saganey and John Pastore and their team for some time, and when it comes to our partnership, and doing right by our clients, their actions speak louder than words. A very high degree of trust is required between CPAs and anyone they refer their clients to – if I introduce a business owner client to an Integrated advisor, I know they won’t let me down. I’m glad they’ve received this recognition from the MSCPA, it is well-deserved.”

Integrated Partners has plans to continue the expansion of its CPA Program nationwide and is actively looking for qualified financial advisors to pair with CPAs across the country.

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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-four 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. MSCPA, Integrated Partners, InTouch Innovations, Integrated Business Alliance, Integrated Family Office, Alkon Levine, LGA LLP and McGaunn & Schwadron, CPAs LLC are separate entities from LPL Financial.

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