

NEWS

FOR IMMEDIATE RELEASE

 Karen Lee & Associates, LLC

CONTACT

Karen J. Lee
Karen Lee & Associates LLC
klee@intfingroup.com
800-849-5916



Karen Lee,
CFP®, CLU, ChFC, MSFS, AEP

Local Financial Advisor Speaks to Peers at National Conference

Karen Lee Explores How Best to Learn About Clients' Needs

Atlanta, GA (June 23, 2009) – Karen Lee, an Atlanta-based CERTIFIED FINANCIAL PLANNER™ professional and President of Karen Lee & Associates, LLC, was a featured speaker for a break-out session at the Securities America National Conference held June 6-10, 2009, in Omaha, Nebraska.

Lee's topic, *Sometimes I Feel Like a Therapist Instead of a Financial Planner*, addressed the issue of clients' "money baggage," and the importance to advisors of being aware of that baggage in order to help clients successfully achieve their financial objectives. "Many people have a complex relationship with money and don't even realize how they are sabotaging their futures through their current spending," says Lee. "As advisors, we need to recognize that we're dealing with clients emotional issues about money, whether we like it or not."

Lee acknowledges that advisors don't necessarily have the ability to reform people. But by having deeper conversations with clients, they may recognize the need to change their behavior around money. Lee relies on listening skills, asks open-ended questions and uses her keen sense of humor to dig deep with clients.

Lee was also a panelist for the Super Women's Summit, a by-invitation preconference session led by industry influential Marie Swift, president of Impact Communications. Panelists addressed issues such as work/life balance; differences between men and women with regard to risk tolerance; and issues of business operations and practice management. The keynote speaker for the Summit was Marion Asnes, Editor-in-chief of Financial Planning magazine.

The conference offered 90 educational sessions, in the areas of business growth, financial planning, asset management, technology, compliance and practice management. Advisors and their associates from across the

country gathered to attend sessions, secure necessary CE credits, network with colleagues for formal and informal sharing of best practices, and celebrate the 25th anniversary of Securities America.

About Karen Lee, CFP®, CLU, ChFC, MSFS, AEP

Karen J. Lee of Karen Lee and Associates, LLC in Atlanta, Georgia provides financial planning services. She is a CERTIFIED FINANCIAL PLANNER™ professional and holds Chartered Life Underwriter and Chartered Financial Consultant certifications. Karen has a Masters of Architecture from Tulane University and a Master's of Science in Financial Services from the American College in Bryn Mawr, PA. She also holds the Accredited Estate Planner designation. Since beginning work in the financial services industry in 1987, Karen has worked with hundreds of families, individuals and small businesses in helping them design a plan to achieve their financial dreams. She has the comprehensive education and experience to handle all aspects of a person's financial situation. Karen is the author of the forthcoming book, **It's Just Money - So Why Does It Cause So Many Problems**. For more information, visit www.karenleeandassociates.com.

Securities offered through Securities America, Inc. Member FINRA/SIPC. Karen J. Lee, CFP, CLU, ChFC, MSFS, AEP, Registered Representative. Advisory Services offered through Securities America Advisors, Inc. Karen J. Lee, CFP, CLU, ChFC, MSFS, AEP, Financial Planner, Karen Lee & Associates, LLC, Integrated Financial Group, Inc., and the Securities America companies are unaffiliated. Karen Lee & Associates, LLC is a member firm of Integrated Financial Group, Inc, a consortium of independent financial consultants.