



# Chapter News



North Atlanta Chapter - In It's 29th Year

September 2008

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## President's Message

We had a great turnout at the August meeting just to be met with a poor choice of meeting space by the DoubleTree Hotel staff. We think we've got the problem ironed out, and it is safe to come back.

For all of you who appreciated Georgia State Economist Don Ratajczak when he wrote in the AJC, we are having two meetings in January. One, a regular meeting at the DoubleTree Hotel and the second meeting will be a joint meeting with the FPA (Financial Planning Association) where Dr. Ratajczak will speak. If you've never heard him, you're in for a treat. If you've heard him before, you know you must come!

I'd like to thank Ron Wrenn, our vice president for arranging Donald W. Patrick MBA, CSA, CFP to speak to our group for both before and after dinner topics, Creating Certainty In An Uncertain World and The New Rules of Investing for Retirement. Mr. Patrick is the Managing Director at Integrated Financial Group in Atlanta.

Jim Ray  
Chapter President

## Chapter Meeting Information

**When:** September 18, 2008

**Where:** Doubletree Hotel NW Atlanta off Windy Hill Road. From I-75 in Cobb Co. go west on Windy Hill Road (exit #260). Hotel driveway will be on your right located between Popeye's Chicken and Wachovia Bank. Phone: 770-272-9441.

**Time:** 5:30 p.m. registration, 6 p.m. First Speaker, 7:30 p.m. Second Speaker

**Cost:** Students \$15, \$25 for chapter members, with a \$5 member discount available if registered by Monday, September 15.

**Register:** Send [email](#) or visit the [chapter's web page](#). Remember to include (1) your name, (2) GSCPA member number and (3) contact phone number.

**Dinner Buffet:** Garden Salad with variety of dressings, Smoked Pork and Mushroom Ragout, Roasted Cornish Hen, Gnocchi, Rainbow Carrots, White Chocolate Raspberry Tart, Rolls and Butter, Coffee and Iced Tea.

## Speaker Information:

**Donald W. Patrick MBA, CFP®** will speak on "Creating Certainty In An Uncertain World" and "The New Rules of Investing for Retirement." Don Patrick brings over two decades of experience advising individuals, professionals and businesses in a wide range of financial matters, from risk management, investments and taxes, to general business consulting. He specializes in helping pre-retirees and retirees with the myriad of financial issues they face at this most important phase of their financial lives. The primary focus is to provide an income that they cannot outlive, improve returns, protect their principal and reduce taxes.

He has been a consultant for the Small Business Administration, and was previously regional Vice President of Smathers & Company, a California based investment management firm. Don was also Vice President of the nationally-recognized firm, Conway Financial Advisors, in Boca Raton, Florida. While at Conway, he was a financial advisor; he headed their investment research department; was vice president of the advisory firm; and established/headed the firm's investment division. For an additional twelve years, he was director of financial planning

and investments at Porraro and Associates in Atlanta, Georgia.

Currently, Don is managing director of Integrated Financial Group, an elite consortium of independent financial planners. Don earned his MBA from the University of Southern California where he was graduated with honors. His major studies were small business development and finance. Undergraduate studies were completed at Loyola University Los Angeles in the areas of finance and economics. He served as a pilot in the U.S. Air Force, graduating first in his class.

An aeronaut who's been flying since age 16, Don has logged 11,000 hours mostly in jets for the Air Force and Eastern Airlines. He volunteers for and is an ardent supporter of Angel Flight, a nonprofit organization of volunteer pilots who transport individuals with medical and financial needs.

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