

**FOR IMMEDIATE RELEASE:**

**United Capital Financial Advisers partners with Capital Planning Group to expand its national network of wealth management firms**

*October 9, 2009*

Newport Beach, CA – United Capital Financial Advisers, LLC, a national network of financial advisory firms, announced that on October 9, 2009, the Capital Planning Group, a ten year-old financial planning firm based in Fort Lauderdale and Miami Florida, was officially welcomed into the nationwide United Capital partnership. In making the announcement, United Capital Financial Advisers CEO Joe Duran commented, “We are excited to welcome Capital Planning Group into our family of advisory firms. The collective skill sets and decades of experience their team brings to the table are extraordinary. They are a firm that really understands how to focus on and service their clients with the best advice, planning, retirement and insurance solutions”. Duran also stated that “we see the Capital Planning Group as an anchor firm and market dominator in the South Florida region; we plan on building a United Capital ‘super region’ around their practice”.

Neal Slafsky CLU, ChFC, CFP<sup>®</sup> stated that, “We truly believe economic chaos and confusion affecting the world has created unprecedented opportunity to grow an independent, advice-lead, client-centric practice.” By selective partnering with advisory firms like the Capital Planning Group, United Capital has added incredible centers of excellence in the area of cutting-edge planning, retirement and insurance solutions. United Capital constantly strives to enhance its existing services and, through this partnership with Capital Planning Group, feels that it has added incredible strength in area of Capital Planning Group’s expertise. All United Capital partner offices share resources, allowing advisers to service clients throughout a wider geographic area.

Robert Wolfe, CFP<sup>®</sup>, Managing Director of the Capital Planning Group, expressed his enthusiasm for the new partnership. “Our new partnership with United Capital provides us with access to the expertise and resources to attract quality wealth managers and investment advisors, access to best-in-class investment solutions, and the technological and operational infrastructure to efficiently manage a market dominant wealth management practice. We believe that a paradigm shift has occurred in which advisors are seeking a different balance between independence, and the resources and leverage of a larger firm. We have struck that balance in our partnership with United Capital.”

United Capital Financial Advisers has pioneered multiple concepts in financial planning, including its “*One Best Financial Life™*” planning platform, structure in planning for specific client financial needs. This client-centric tool was developed to allow clients to

focus exclusively on the things that they can control and to track their funded status along the way to ensure that financial decisions made are on the right track.

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United Capital Financial Advisers, LLC, based in Newport Beach, CA, is a national network of financial advisory firms. Formed in 2005 by a team of seasoned wealth advisory and investment industry professionals, the firm currently has 22 offices across the country, providing life-relevant wealth advice and objective discretionary investment advisory services to private and institutional clients, representing more than \$9 billion in assets. United Capital has a unique combination of expertise in acquiring, operating, and transforming owner-operated independent advisory practices from lifestyle businesses into large-scale, high value wealth counseling offices with access to the resources of a large national company.

For more information, please visit [www.unitedcp.com](http://www.unitedcp.com).

Founded in 1999, Capital Planning Group grew out of a partnership between a property and casualty insurance agency, Seitlin & Co., and accounting firm, Mallah Furman & Co. Both Mallah Furman and Seitlin successfully offered clients in their respective fields the highest degree of professional expertise and advice and unparalleled customer experience. The goal in creating Capital Planning Group was to establish a financial planning firm with these same high service standards.

The outcome was Capital Planning Group, which actively began recruiting Certified Financial Planners™ based on areas of specialization that would allow virtually every aspect of a client's financial plan to be handled in-house. Since its founding in 1999, Capital Planning Group has amassed over \$300 million in Advisory Assets. In addition to a steady stream of referrals by satisfied clients, Seitlin and Mallah Furman both continue to recommend Capital Planning Group to their clients.

For more information, please visit:

<http://www.unitedcp.com/client/locations/cpg/index.html>