

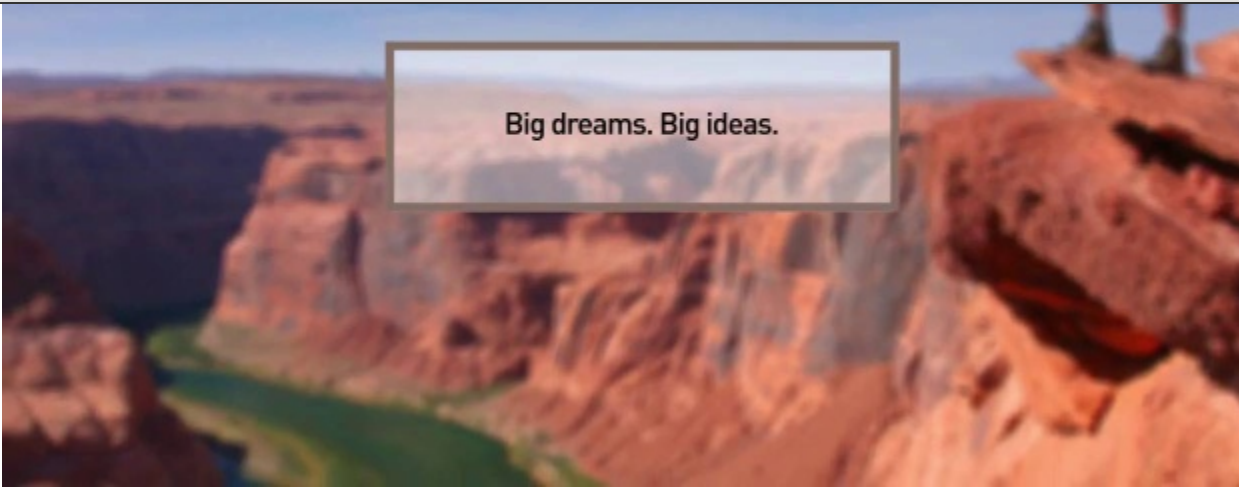


## Life, Retirement & Tax Reduction Planning

*Planning Your Most  
Important Life Goals*

Located in Durham, NC, Integrated Life and Financial Planning is an independent financial services firm founded by Jerry Bergner, AAMS CMFC.

**Jerry's aim is to help you achieve the life YOU envision.**

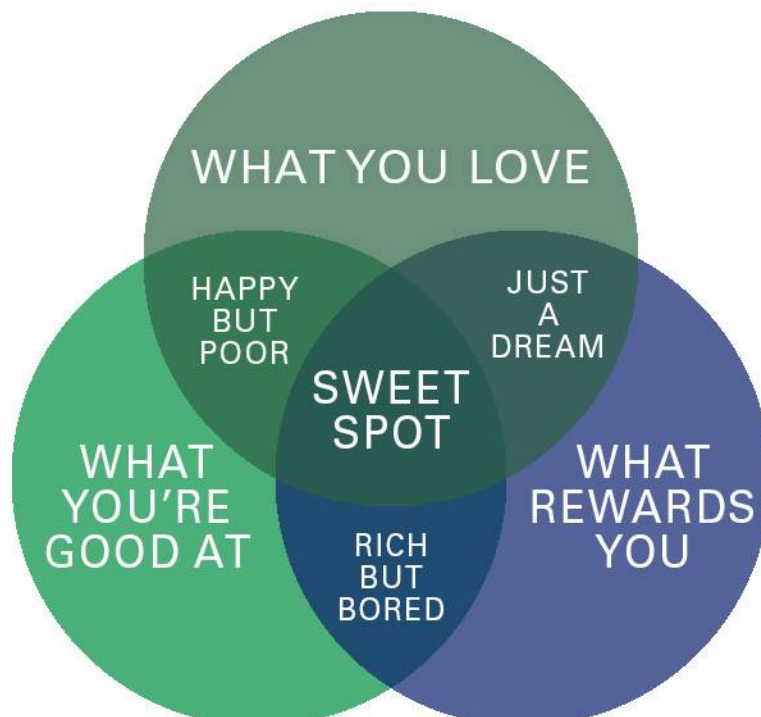


Big dreams. Big ideas.

Jerry will work with you one-on-one to uncover your most important goals and priorities in life, and then create a financial strategy that supports those life goals.

Other financial advisors work to shape your life to meet your financial realities.

Jerry's focus is to improve your financial reality so you can achieve your life goals.



Jerry has over 20 years of experience helping people with their finances

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using a well structured and disciplined approach.

Jerry's time tested strategies in investment management adheres to modern portfolio theory.

It is not exciting but he believe in keeping excitement out of your finances.

Instead he promotes structured planning to help you achieve a more satisfying life.

Jerry's clients and brand and culture are different than a typical firm.

He supports his clients in being their best and therefore looks forward to the challenges you may bring him.

**They bring out his best work!**



To learn more, or see if this approach might be a good fit for you,

*We will send you a confirmation email immediately.*


*If you do not get one, the appointment did not register properly; perhaps you did not click through to the end.*

There is no cost or obligation for the initial call.

Jerry wants to work with people who feel they will benefit from our approach.

***This might be the change you have been looking for!***

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 [About Jerry](#)

 [Services](#)

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**FINANCIAL PLANNER SERVICES  
DURHAM, NC**

