

Jeffrey Lane & Associates, Inc.

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JIM CASEY NAMES HEATHER SANTANA AS VICE PRESIDENT OF
OPERATIONS FOR INTEGRATED WEALTH MANAGEMENT

Jim Casey, President & CEO of Integrated Wealth Management, announced today that he has promoted Heather Santana as Vice President of Operations for the company.

Santana, based at Integrated Wealth Management's Los Angeles office has been with the organization since 1991 serving as Director of Client Services, and in 2008 was promoted to Director of Operations. She is a certified Paralegal and a certified Paraplanner, and has both Assistant Representative-Order Processing (series 11) and Uniform Securities Agent State Law (series 63) licenses, as well as being a Notary Public.

Jim Casey said, "Heather was one of my first employees and has proven herself to be an enormous asset to us and our clients. I am delighted to promote her to this position, and am confident she will continue to serve our clients in a responsible and creative way".

Heather Santana added, " I am excited about this new opportunity and look forward to the challenges and economic growth in the coming years".

With offices in Los Angeles, Palm Springs and Palm Desert, Integrated Wealth Management continues to grow its business and recently announced its 13th consecutive year of revenue growth.

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