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The Advantages of Independence

There are a lot of big brokerage houses out there, and a lot of local advisory firms associated with them. Most of those firms do a fairly good job of servicing their clients and managing investments. But because they are tied to the brokerage houses, they aren't always free to do what's in the best interest of their clients.

Then there's Independent Capital Management (ICM). As the name suggests, ICM is fully independent, so the firm and its advisors aren't forced to push proprietary products. They're free to do whatever best serves each individual client. Staffed by a team of experts in a variety of financial disciplines, ICM offers a wide range of best-in-class products and services as it guides clients knowledgeably and effectively through even the most complex financial situations.

Real Advice From Real People

"At ICM, we offer our clients a unique combination: independent professional advice along with a personal touch. That's what we call 'real advice from real people,'" says Drew Marloe, president and CEO. "For instance, we prefer not to do business over the phone. Instead, we like to meet in person, discuss things face-to-face and educate clients on where they are and where they could be. Areas we focus on include retirement planning, college education planning, estate planning and insurance, as well as real estate through our ICM Lending division. Our experience and expertise are broad enough that we can help with just about any financial concern a client may have."

The firm has 10 offices in Southern California, reaching from San Diego to Camarillo, and covering San Diego, Orange, Los Angeles, Ventura, San Bernardino and Riverside counties, as well as Las Vegas, Nevada. ICM's career financial advisors are professionally trained and licensed as certified financial planners. With its 15 additional affiliated offices, ICM serves its clients with approximately 300 advisors. The ICM staff represents as vast a variety of ethnicities and nationalities as can be found anywhere, focusing on business owners as well as the multicultural market.

Thriving, Growing, Hiring, Training

One indication of ICM's success is that it is one of the rare companies actually expanding during the economic downturn. It added 18 new hires recently and is looking to add more. "ICM is



Drew Marloe
President/CEO

a great place to work," says Marloe. "We are willing to train the right people, and we have a very extensive management training program. We provide benefits such as healthcare insurance for all our employees, and we offer a matching 401(k). Plus, we're always looking to open more offices."

Both employees and clients benefit from the strength of the ICM management team. Most of ICM's current managers have been managers with the firm since the 1990s, and they play an important role in the training process. As a result, new ICM advisors are highly prepared to make a positive impact on their clients' future.

In an era when many large national firms are looking to get rid of their smaller clients, ICM is committed to helping all investors. Named to the *Inc. 500* twice and featured in *American Executive* magazine in May 2010, Independent Capital Management is recognized as a powerful force in Southern California and beyond. As thousands of clients can testify, independence is a great thing to have.



Independent
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