SYM FINANCIAL ADVISORS

Indiana - Winona Lake, Fort Wayne, Indianapolis, Mishawaka
Michigan - Midland | sym.com | 800-888-7968

MEDICAL AND DENTAL PROFESSIONAL WEALTH PLANNING BLUEPRINT

HEALTHCARE BLUEPRINT

SYM WEALTH MANAGEMENT

Choices. And advisors who understand them.

Your planning needs are different. That's why, when serving medical and dental professionals, effective financial advisors must understand and anticipate the unique challenges and opportunities that you face - from residency to retirement.

- You may purchase and phase out of **private practice ownership**, which calls for custom planning strategies.
- Your **highest-earning income years** will start later, last for a shorter time, and bring in more than the average professional in other industries.
- Particularly in early career, your **professional skill and earning potential** may be all the assets you have. That means the biggest financial risk during these years is loss or reduction of income.
- Additionally, **medical and dental professionals are regularly targeted** by financial gurus, most of whom are *not obligated to serve in their clients' exclusive best interest.*

The word SYM means together. SYM's 50+ year track record of uncommon service to healthcare professionals means you can trust SYM to bring together – and keep together – what's most important to you.

Secure the benefits. SYM's advisory team already knows your industry and the path medical and dental professionals take to create wealth. As an independent Registered Investment Advisory firm and fee-only fiduciary working for your best interest, now we want to know and serve you.

Credentials do matter. SYM advisory teams are composed of Certified Financial Planners (CFP®), Financial Planning Qualified Professionals (FPQP™), Chartered Financial Analysts (CFA), Accredited Investment Fiduciaries (AIF®), Juris Doctor (JD), MBA, MSA, CPA and others with advanced designations and degrees. Like in healthcare, these certifications matter.

SYM Financial Advisors Commits

- To **empower** advisory teams to deliver an uncommon level of personal service
- To **act** in the client's personal best interest while holding ourselves to industry-leading standards of professional behavior and ethics
- To **anticipate** your needs for the future
- To **pursue** informed, unbiased investment selections and **commit** to ongoing monitoring
- To **communicate** conscientiously and with integrity
- To **build** trusted relationships that flourish for a lifetime

Since 1968, SYM has worked to **anticipate clients' financial needs** and **deliver results.** As a fee-only independent Registered Investment Advisor (RIA) we bring depth and breadth to financial planning and investment management for individuals, business owners, corporate executives, medical and dental professionals, and to the design and implementation of employer-sponsored retirement plans. **Contact us for a conversation at 800-888-7968 or info@sym.com.**

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