SYM FINANCIAL ADVISORS

*Indiana* - *Winona Lake, Fort Wayne, Carmel, South Bend*
*Michigan* - *Midland* | *sym.com* | *800-888-7968*

# WEALTH PLANNING FOR HEALTHCARE PROFESSIONALS

SYM Wealth Management

HEALTHCARE BLUEPRINT

## Wealth planning is personal and your path is unique

Your planning needs are different. That's why, when serving healthcare professionals, effective financial advisors must understand and anticipate the unique challenges and opportunities 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, **healthcare 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.

***We know your industry, and want to know you even better.*** SYM's advisory team already understands your industry and the path healthcare professionals take to create wealth. Now, as an independent, Registered Investment Advisory firm and fiduciary working for your best interest, 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 Fiduciary (AIF®), Juris Doctorate (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 an independent Registered Investment Advisor (RIA) we bring depth and breadth to financial planning and investment management for individuals, business owners, corporate executives, healthcare 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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