SYM FINANCIAL ADVISORS

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

SYM Wealth Management

HEALTHCARE BLUEPRINT

Wealth Planning for Healthcare Professionals

AS A HEALTHCARE PROFESSIONAL, YOUR WEALTH IS PERSONAL AND YOUR PATH UNIQUE

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.

Your planning needs are different. When serving healthcare professionals, effective financial advisors understand and anticipate the unique challenges and opportunities such professionals 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.*

EXPECT DEPTH AND BREADTH FROM YOUR FINANCIAL ADVISOR

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 Certfied Financial Planners (CFP ®), Financial Planning Qualified Professionals (FPQP™), Chartered Financial Analysts (CFA), 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** investments with consideration of net-of-expense risk and return prospects
- To **communicate** conscientiously and with integrity
- To **build** trusted relationships that flourish for a lifetime

For more than 50 years, SYM has worked to anticipate clients' financial needs and deliver results. As an independent Registered Investment Advisor (RIA) and fiduciary, SYM brings personal service 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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