

Questioning your current investment plan? **MAYBE YOU SHOULD.**



Even the most patient investors may come to question the wisdom of the investment plan they've been following. **We'd like to help—starting with a cup of coffee and a second opinion.**

You're welcome to come in and sit with us. We'll ask you to outline your financial goals—what your investment portfolio is intended to do for you. Then we'll review the portfolio for and with you.

If we think your investments continue to be well-suited to your long-term goals, we'll gladly tell you so. If, on the other hand, we think some of your investments no longer fit with your goals, we'll explain why, in plain English. And if you like, we'll recommend some alternatives.

Either way, the coffee is on us!

Private Wealth Management for Select Individuals

Call Bradley Gummow, Managing Director – Investment Officer,
PIM Portfolio Manager or Thomas Weightman, Financial Consultant



Bradley L. Gummow



Thomas M. Weightman

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Have you had a financial check-up lately? **MAYBE YOU SHOULD.**



You became a medical professional to focus on the long-term health of your patients. That's the same approach you should take in choosing an investment planning professional.

We craft investment plans that reflect the needs posed by medical professionals – from the early challenges of delayed income and student loans to the financial, tax and estate implications of wealth management in developed careers. We specialize in helping physicians and other medical professionals invest wisely to accumulate and preserve assets.

Let us help you plan your financial well-being. Or ask us to review your current investment portfolio for a second opinion.

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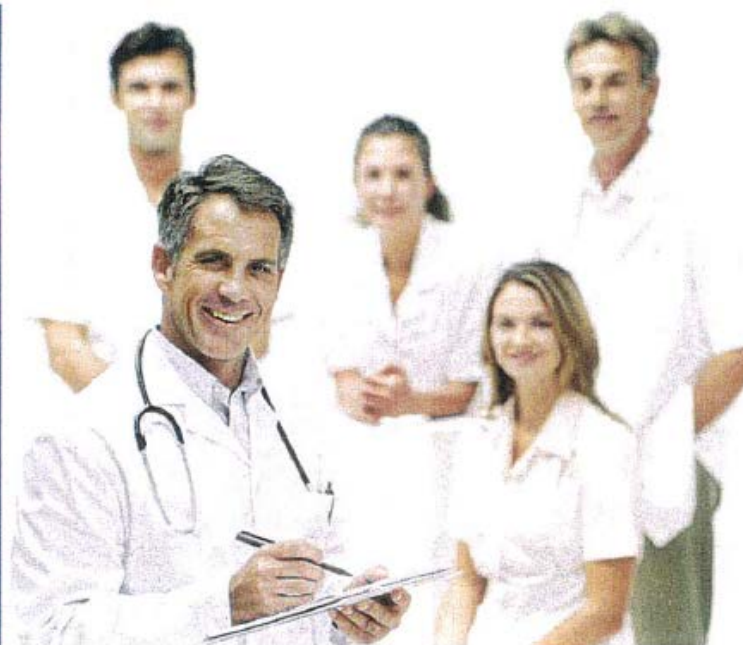
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