WCG PHYSICIANS DIVISION

Dedicated Expertise and Services for Medical Professionals and Their Families

At The Wealth Consulting Group (WCG), we offer Personal CFO services through our Physicians Division to a broad range of medical professionals, bringing:

- **Specialized expertise**, leveraging more than two decades of experience focused on the unique needs of physicians, dentists, and medical practices of all sizes.
- **Deep understanding of your profession and highly demanding career,** as well as the unique pressures and challenges you face.
- **Powerful combination** of industry-leading service, talent, and national resources.

Our High Service Standards Drive a More Flexible and Personal Experience

Our goal is to help ensure your finances are properly managed as we help lead you to the future you desire. We're familiar with the time demands and constraints you face and can be "on call" to meet with you outside of a traditional 9-5 schedule. Our sophisticated technology solutions enable us to communicate effectively, even when you can't meet face-to-face.

The Understanding You Seek for the Unique Challenges You Face

At WCG, our independent wealth advisors understand your increased need for:

- **Asset protection** to help protect assets from potential liability suits.
- **Cash flow management** to create balance between business and family income needs.
- **Disability coverage** for income continuation in the event of a serious injury or illness.
- **Life insurance** to protect your loved ones and their lifestyles if you're no longer there to do so.
- **Tax strategies** to help reduce your overall tax burden, protect your legacy, and transition estate assets in the most tax-efficient manner.*
- **Debt management** strategies for managing credit and coping with accumulated debt from education, business, personal, and mortgage loans.
- **Education funding strategies** that aim to ensure your children are not saddled with high education debt.

*Tax services are not offered by LPL Financial or affiliated advisors.

The WCG Physicians Division helps physicians, dentists and other medical professionals organize their financial lives, strive to grow their wealth, and protect their families and their practices.

The WCG Difference: Personal CFO Services for Physicians and Dental Professionals

Serving as your Personal CFO, your WCG wealth advisor is a dedicated resource for assembling and integrating your team of consultants who form a comprehensive and cohesive unit for managing your wealth. Over the course of two decades, we have built strong relationships with professionals we believe to be among the industry's best and brightest, including: institutional investment managers, tax advisors, trust officers, insurance providers, accountants, and banking professionals. These professionals complement our talented team and bring best-in-class services to each client engagement.

Comprehensive Wealth Management

We take a comprehensive approach to helping you manage your financial life so you can rest assured that your finances are professionally managed and coordinated on your behalf, providing you with more time to concentrate on what's most important to you—your career, practice, family, and other commitments. We coordinate tax-efficient strategies in a collaborative manner with your other professional advisors to help ensure seamless coordination that places your interests first in these and other areas:

- Financial Planning
- Comprehensive Risk Management
- Insurance Planning
- Retirement Income Planning
- Investment Management
- Education Planning
- Tax Strategies*
- Estate & Legacy Planning
- Philanthropic/Charitable Giving
- Trust Services**
- Executive Compensation Planning
- Business Succession Planning

Simplifying Your Financial Life: The WCG Personal CFO Wealth Management System

WCG Physicians Division clients are provided online access to our comprehensive wealth management system. The WCG Personal CFO system simplifies wealth planning using sophisticated account aggregation software and tools to provide a comprehensive view of your entire financial picture, including investment, banking, and credit card accounts, loans, insurance policies, and more. A secure online vault enables you to store copies of important financial and estate planning documents, including wills, trust documents, passports, titles, deeds, etc., in one place for easy access. Visit www.wealthcg.com to watch our short video and learn more about the WCG Personal CFO Wealth Management System.

About WCG

Since 1995, The Wealth Consulting Group (WCG) has served the diverse financial and wealth planning needs of accomplished individuals, families and businesses seeking unbiased advice and sophisticated financial strategies. Our vision is to be considered the best wealth management company of its kind in the minds of our clients and centers of influence. WCG advisors draw upon the broad expertise and talent within our firm and across our alliance partners to develop strategies for the complex financial challenges that accompany affluence. Serving as your Personal CFO, we help you set and implement clear goals aligned with your needs, values and objectives.

Learn more about the advantages of working with a team that truly understands and respects the unique challenges you face.

Visit www.wealthcg.com/physicians-division to watch our exclusive Physicians Division video.

The Wealth Consulting Group

Call 800.346.4063 to schedule a no-obligation consultation or visit us at www.wealthcg.com

*Tax services are not offered by LPL Financial or affiliated advisors. **LPL Financial Representatives offer access to Trust Services through The Private Trust Company N.A., an affiliate of LPL Financial.