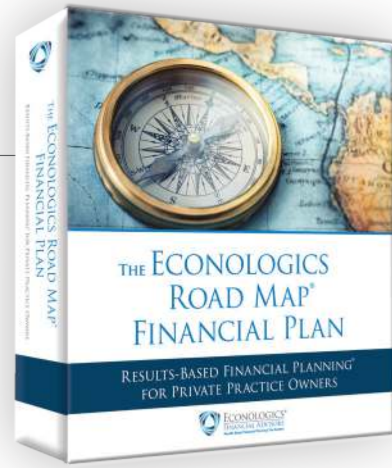
The Econologics Road Map® Financial Plan

Results-Based Financial Planning® for Private Practice Owners

Econologics® Financial Advisors
Results-Based Financial Planning® for Owners

Your Clear Path to Financial Freedom



As a practitioner, you focus on your patients. As an owner and executive of your practice, you focus on your bottom line and achieving business goals. On the rare occasion when you have extra time and energy, you focus on your family's financial future.

There is no question that financial planning has been made overly complex, but that shouldn't stop you from being in control of your future.

The Econologics Road Map Financial Plan® is a comprehensive, step-by-step guide that takes the guesswork out of financial planning for a practice owner and puts you back in control.

A Fiduciary Client Relationship

As a registered investment advisory firm we maintain a fiduciary relationship with our clients. This means we are always required to give advice in your best interest. Because we take this responsibility very seriously, we make the appropriate recommendations to ensure you keep advancing towards your financial goals.

Feel In Control of Your Financial Future

With guidance from your Econologics Financial Advisor, you will:

- Feel more certain of your future with a comprehensive, actionable financial plan.
- Gain knowledge and competency in essential financial policies and procedures.
- Foster a viable, profitable and expanding practice with a known transition strategy.
- Relieve stress by becoming debt-free and achieving excellent credit.
- Achieve viable life goals with provisions for adequate present and future income.
- Safeguard your legacy with complete, efficient and up-to-date estate arrangements.
- Optimize your tax plan to mitigate present and future taxes.
- Protect practically all assets from loss.
- Engage in suitable and stable investments to fund your financial goals.

The Econologics Road Map® Financial Plan for Practice Owners

With the Econologics® Results-Based Financial Planning® System, you'll have a map to know where you are, where you are going and how to get there. We measure your progress along the way, helping you avoid pitfalls and mistakes so you feel fully in control of your financial future.

The team here at Econologics Financial Advisors focuses solely on guiding private practice owners along their path to financial success. We understand the unique challenges of practice ownership and we advise our clients on a multitude of financial areas.

Here is what your plan includes:

Licensed and Trained Financial Advisor: Our Econologics Financial Advisors are licensed and trained to specifically advise practice owner households on financial planning matters utilizing the Results-Based Financial Planning® Econologics® system.

Financial Analysis and Comprehensive Metrics: In order to track your progress towards achieving your financial goals, it is vital to analyze the correct metrics. We utilize 17 unique statistics to assess your current financial situation compared to an optimum financial condition for your household.

Strategic Planning Checklists: We provide checklists for the 9 areas of your financial life to ensure you take the appropriate action steps to successfully implement your plan.

Practice Appraisal: This appraisal report is done by a third party appraiser who provides a detailed estimated calculation of the value of your practice if sold today in the open market.

Debt Elimination Program: A complete analysis of all your debts with a payoff strategy to get you debt-free as efficiently as possible. This report gives you a month-by-month payment plan and a debt-free target date to keep you on track.

Tax Optimization Strategies: You will receive the Econologics Tax Blueprint™ that includes 21 tax strategies, researched specifically for practice owners, to help you keep more of what you make.

Asset Protection Advice: This part of the plan addresses your household's protection from lawsuits, creditor attacks, long-term medical risks and death by properly structuring assets and utilizing insurance where exposed.

Wealth Building & Management Strategy: Your plan will include the Econologics Wealth Building Blueprint, which, when implemented, begins to set up systems in your household for the purpose of maximizing your investments for future wealth.

Retirement Income Report: As part of your plan, we will do an analysis of how the sale of your practice, in conjunction with your other household assets, will affect your future income needs.

9-Step Guide to Build Practice Value: As an added value, we have included an owner's guide to building a profitable and valuable practice with step by step checklists to improve various areas of the business.

Industry Analysis & Candidate Buyers Report: The Industry Analysis compares recent practice sales, giving you insight into current market conditions for practice sale transactions. The Buyers Report lists various industry buyers so you have an insider's view on who's buying practices.

How to get started...

Step 1 ASSESS

Complete an assessment that compares your current financial condition to an optimum one.

Visit **FinancialProsperityIndex.com** to take the assessment today

Step 2 DISCOVER

Meet with a specialist to review your assessment and help discover what needs to be done to improve your financial condition.

Step 3 PLAN

Get a customized financial plan from a trained, licensed advisor who specializes in working with practice owner households.

www.EconologicsFinancialAdvisors.com

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