



THE ECONOLOGICS ROAD MAP[®] FINANCIAL PLAN

RESULTS-BASED FINANCIAL PLANNING[®]
FOR PRIVATE PRACTICE OWNERS



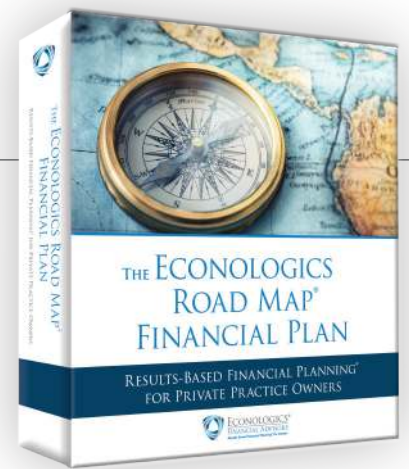
ECONOLOGICS[®]
FINANCIAL ADVISORS
Results-Based Financial Planning[®] for Owners

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.

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.

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. It includes an industry analysis and candidate buyers report.

Econologics® MaxValue Plan™: A checklist for 9 key areas that improve practice value.

Exit Strategies Solutions Summary Report™: The ESS Summary Report is a proprietary 5-step process to determine when you can potentially afford to sell your business. Here's a brief description of the process:

- An examination of the financial gap between the retirement assets you currently own and the projected assets you will need
- An analysis of various "what if" sales scenarios
- An approximate calculation of net proceeds after taxes and fees
- An analysis of retirement income sources to help project your lifetime income after the transaction

The ESS Summary Report will allow you to determine what actions should be taken now so you can exit your business with ease when the time is right. © *Exit Strategies Solutions Summary Report, 2012, Pinnacle Equity Solutions, Inc.*

TAKE THE NEXT STEP TOWARD FINANCIAL FREEDOM!

Visit: www.FinancialProsperityIndex.com

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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