

**EXCLUSIVELY FOR PHYSICIANS BY A PHYSICIAN LIKE
YOU:**

**Welcome to Personal Financial Planning and Investment
Management
To Start Making Work Optional!**

Physician Wealth Solutions intro video



AGAIN:

“I empower doctors by helping you make smart decisions about your money so you can start making work optional and enjoying your life again.”

-Setu Mazumdar, MD, CFP®, RICP®

As published or quoted in

**EMERGENCY
PHYSICIANS
MONTHLY**



Georgia College of Emergency Physicians



Medscape

Dear Fellow Physician and Friend,

Welcome to Physician Wealth Solutions!

I'm Setu Mazumdar, MD, CFP®, RICP® and I'm a financial planner and investment advisor for physicians.

Face it:

Practicing Medicine Is Already Tough and It's Probably Going To Get Tougher!

Not Having a Financial Plan Makes It Even Worse.

Because I'm also a physician, I've experienced firsthand the financial, career, and lifestyle challenges and frustrations you face and how to solve them. Almost no other financial advisor can say that.

I retired from practicing medicine before age 40 so I know what it takes to achieve financial independence, and I'm excited to help you start getting there as well.

I have a valuable **FREE** gift for you: Your **FREE Financial Coaching Consultation**.

In this session we'll go up and down your finances and investments, point out mistakes you might be making, and create an action plan to start fixing those mistakes so you can start your path to making work optional. We'll also figure out whether we want to work together and have me be your financial coach.

Learn more about the consultation and how you can sign up by clicking here: **FREE Financial Consultation**.

Does this sound familiar?

- You're repeatedly blamed for the rising cost of health care and events you have no control over
- You're held to a standard of perfection almost no other occupation is held to
- You feel like you're accused of being a "rich doctor" who makes "too much money" and who isn't paying your "fair share" in taxes
- You're the scapegoat for bad patient outcomes
- Someone else is controlling what you get paid

computers all day long -- and you're sick of it

I know how you feel -- I've been there.

And I also know that if you get your personal finances and investments in order, you may be able to practice medicine on your terms (or walk away), and reduce that stress and anxiety from your life -- or perhaps even eliminate it altogether.

If you don't get your finances and investments in order, those problems could get even worse -- potentially leading to more stress, more anxiety, and burn out.

Stop spinning your wheels and get an action plan in place with your finances and investments.

Start by signing up for your **FREE Financial Coaching Consultation**.

Answer These 10 Questions

1. **Do you feel like you've lost your autonomy in medicine and have control over almost nothing?**
2. **Are you frustrated with the endless paperwork, government and insurance company bureaucracy, and the hassles of electronic medical records?**
3. **Do the threats of paycuts and lawsuits make you sweat?**
4. **Are you getting burned out from practicing medicine and wish you could cut down on your workload if you had the financial means to do so?**
5. **Are you tired of being blamed for rising health care costs and being accused of not paying your "fair share" in taxes and making too much money?**
6. **Do you lack a clear direction or a systematic process for managing your investments and finances?**

8. Are you getting poor investment advice from your current financial advisor who might not be acting in your best interest, might be selling you expensive investment products, not relating to you as a physician, not giving you objective investment advice, or has an investment philosophy that is more like gambling?
9. Do you want to get your financial life in order and want a clear, simplified, easy to understand, and organized financial life so that you can work on your terms again and start making work optional?
10. Do you want to work with a financial planner who is also a physician, who intimately understands your situation, who charges you fees directly, does not sell any financial or investment products, acts in your best interest, gives you objective advice, and has an investment philosophy that is based on academic science not guesswork and speculation?

If you answered Yes to any of those questions, then you've come to the right place because I've helped physicians like you overcome your biggest personal, financial, and investment challenges.

It starts with getting your **FREE Financial Consultation** with me so we can learn about your concerns and frustrations, discuss your goals, and start coming up with an action plan to make smarter money decisions.

I Know 5 Big Outcomes You Want:

1. Financial independence so you can work on your terms
2. Freedom to enjoy other aspects in life besides practicing medicine 24/7
3. A simplified and organized financial life
4. A plan of action and systematic process for making financial decisions

for your financial decisions.

Don't be like many physicians who are stuck in the mud with their finances, make no progress, get stressed out over money, and wonder why they're still working full time in their 60s. It's time to take control of your finances and investments and get them in order.

Check out this website, my story and the services I offer and then sign up for your

FREE Financial Consultation.

I'll talk to you soon!



Setu Mazumdar, MD, CFP®, RICP®

President and Wealth Manager - Physician Wealth Solutions

Emergency Medicine Physician -- Retired before age 40

[CLICK HERE: GET YOUR FREE FINANCIAL COACHING CONSULTATION](#)

FREE CONSULTATION

**Are you ready to take control of your finances and
investments**

and create a path to start making work optional?

managing your finances and investments by yourself and
making big financial mistakes?

Are you disappointed with your current financial advisor
who may

not be acting in your best interests, not giving you
objective advice,

or selling you expensive or inappropriate financial
products?

If you said Yes to any of those questions then set up your
FREE Financial Coaching Session.

JUST CLICK BELOW.

[CLICK HERE: SCHEDULE YOUR FREE FINANCIAL COACHING SESSION](#)

Top 7 Benefits Of Your FREE Financial Consultation

**Here's why the free consultation is valuable to you and
what we'll do:**

this alone is worth setting up the session with me

3. **Determine whether your financial advisor is acting in your best interests** -- Is he giving you objective advice or selling you expensive or potentially inappropriate financial products? We'll find out.
4. **Review your investment and retirement portfolio to see if it makes sense** -- Do you have a sound investment philosophy or are you just gambling with your hard earned money? I'll show you what you should be doing.
5. **Live demo my interactive, collaborative, and dynamic goal based financial planning process** -- you'll experience exactly what it's like to be a client and work together and how I can add value to you beyond the fee
6. **Create an action plan to get your finances and investments in order** -- you'll likely walk away with at least a few ideas you can implement
7. **Determine whether we're a good fit to work together** -- if we're a good fit, then you'll become a client and we'll partner together to whip your finances into shape. If we're not a good fit and you don't want to become a client, that's OK too. You'll still get all the benefits of the coaching session.

AND MUCH MORE!

What are you waiting for? The longer you wait, the more frustrated you'll become.

Here's how to set up the Financial Coaching Session and how it works -- Just 3 easy steps:

1. Just click on any of the buttons on this page and choose a day and time that's convenient to you using my online calendar system
2. I'll then send you an email confirmation which will have a link to a short questionnaire I'd like for you to fill out. Don't worry -- the questionnaire is easy and will only take you 5 minutes to complete.
3. I'll call you during our scheduled time. The Financial Coaching Session will last about 45-60 minutes and you'll get all the benefits described above. Make sure you are in front of your computer because we'll be using some interactive tools including screen sharing. You'll experience exactly what it's like to be a client.

It's that simple.

Are We A Good Fit To Work Together?

Are you a good fit for me? Yes, if you meet the following criteria:

- You are serious about getting your entire financial life in order
- You are committed to taking action and implementing changes
- You are an enjoyable person to work with
- You value an ongoing and long term relationship with a trusted coach and advisor
- You are willing to pay a fee that is fair to both of us

Am I a good fit for you? Yes, if you want the following:

- You want an advisor who is one of you and understands the unique challenges physicians face
- You want comprehensive, ongoing, personal financial planning that encompasses all of the major areas of your financial life
- You want a strictly fee only advisor who is paid directly by you and does not sell financial products
- You want an advisor who is a fiduciary, provides objective financial and investment advice and who is required to act in your best interests
- You want an advisor who communicates with you regularly and spends time with you
- You want a "straight shooter": an advisor who's going to give you no BS, cut to the chase advice about investing and financial decisions
- You want an advisor who "eats his own cooking" and manages his personal finances and investments using a similar philosophy that he recommends to you
- You want an advisor who's enjoyable to work with

See if we're a good fit to work together.

Schedule your FREE Financial Consultation NOW!

[CLICK HERE: SIGN UP FOR YOUR FREE FINANCIAL CONSULTATION](#)

is your financial advisor also a physician just like you and
knows what it's like to be a physician?

I DOUBT IT.

Meet Setu Mazumdar, MD, CFP®, RICP®

The Financial Planner For Doctors

[CLICK HERE: SCHEDULE FREE FINANCIAL COACHING SESSION](#)



Who Am I?

I'm Setu Mazumdar, MD, CFP®, RICP® and I'm "The Financial Planner For Doctors." Through comprehensive financial planning and investment management, I empower physicians like you to get your financial life in order so you can stop making work mandatory and start making work optional.

I'm also a physician just like you, but I retired from practicing medicine before age 40!

Almost all of my clients are physicians from various medical specialties coast to coast.

My experience as a physician gives me the unique ability to understand your situation because I've literally walked in your shoes and faced the same financial, career, and life challenges you face.

There's no way your financial advisor can truly understand you as a physician unless your advisor is also

Your financial advisor cannot truly understand what it feels like to:

- Endure more than a decade of grueling training, education and exams
- Stay up all night every 3 or 4 nights and then work the next day dead tired
- Have someone else's life literally in your hands
- Be held to a standard of perfection that no other occupation is held to
- Get blamed for events that you have no control over
- Face continuous scrutiny from the government and third parties who have their hands in your pockets and think you make too much money
- Worry about the threat of being sued every day
- Really sacrifice by giving up your weekends, holidays and family time

Your financial advisor can't possibly grasp all of that unless your advisor is also a physician like you.

And that's why I'm different. **I am one of you.** I walk in your shoes, and I've experienced the same challenges you've faced. Can your financial advisor say that? I doubt it.

But I can.

You see, financial planning and investment management is a deeply personal and ongoing relationship. It goes way beyond just making trades and crunching some numbers. I can relate to you in a way that almost no other advisor can.

Why Should You Believe Me?

I know you're raising your eyebrows at this point. You're probably saying to yourself...

"I mean seriously...a doctor who transformed into a financial planner to help other doctors?"

"Did you lose your medical license? Did you just snap one day and go nuts? Are you competent to manage other physicians' finances and investments? Is this a joke or a scam, and are you wasting my time?"

Here's a brief background on my education and experience to erase your skepticism:

Kappa

- Received my **MD** degree from **Johns Hopkins School of Medicine** -- one of the top medical schools in the world
- **Board certified in emergency medicine** and worked full time as an emergency medicine physician
- Am a **CERTIFIED FINANCIAL PLANNER™ professional** -- the gold standard designation in the financial planning profession and covers such areas as investment planning, tax planning, insurance planning, estate planning, and more
- Am a **Retirement Income Certified Professional®** -- a professional designation which allows me to help you with retirement income planning strategies
- Am an **Accredited Investment Fiduciary®** -- a professional designation from the Center For Fiduciary Studies® which signifies specialized knowledge of fiduciary responsibility
- **Founder and sole owner of Physician Wealth Solutions** -- a fee only financial planning and investment management firm where I empower doctors to take control of their finances
- **Published numerous personal finance articles in various physician magazines**, including Emergency Physicians Monthly and Physicians Money Digest

I'll admit I'm not the smartest guy in the world, but as you can see I'm no slouch either. And no I didn't lose my medical license. And no this isn't a scam. In fact I take this very seriously. And you should too if you care about getting your finances and investments in order and living your life on your terms.

My Story

I've got an embarrassing confession to make: I made a ton of financial mistakes early in my career -- probably the same ones you might be making now. I had no clue what I was doing with my investments and I didn't know anything about retirement planning, disability insurance, estate planning, or college planning. I didn't have a single hour in medical school or residency devoted to financial planning, yet it became a big part of my life and affected everything else in my life that was important to me.

Despite those mistakes I still retired from medicine before age 40!

No, it's not a typo and no I didn't win the lottery. Here's how I did it:

My wife and I are both physicians -- we met in medical school at Johns Hopkins -- but unlike most doctors, we made our finances and investments a priority early in our careers.

was a cardboard box! My wife's parents toiled 12 hours a day 7 days a week working at Chinese fast food places.

Those types of experiences shaped the way we valued money. **We saw money as a tool to achieve financial freedom and independence at an early age so we could do what we want, how we want, and when we want.** When my wife and I graduated from medical school and residency, we committed to taking control of our finances right from the get go.

While we enjoyed certain aspects of practicing medicine, like many physicians we eventually got sick and tired of all the BS we have to put up with: lawsuits, paperwork and electronic medical records, annual tests, hospital administrators, nightshifts, the ridiculous volume of patients we have to see, and on and on and on.

But achieving a degree of financial independence at an early age wasn't easy.

You see, we made a ton of financial mistakes that cost us dearly. We had no clue what we were doing with our investments, and I didn't know anything about financial planning.

We also saw so many of our physician colleagues giving up their weekends, nights and holidays because they didn't have their financial lives in order -- many of them are absolutely miserable. We decided we didn't want to be like that. We wanted to take control of our situation.

The increasing complexity of our personal financial lives was what first ignited my passion for financial planning and investment management.

But something else really added fuel to the fire...

My Passion and Desire To Help Physicians

I'm quite disappointed with poor advice many financial advisors give to doctors. Many sell expensive and inappropriate investment products. I was certainly a victim of this because I hired a financial advisor early in my career, but he was just a salesman peddling products not giving advice. His answer to all my financial challenges was to keep selling me expensive whole life insurance policies. He just wasn't acting in my best interests.

It's sort of like you getting paid by the pharmaceutical companies for the drugs you prescribe instead of the

Worse yet, it's legal! Why would you ever hire such a person to manage your hard earned money?

I realized most physicians either didn't know what they were doing if they managed their finances by themselves, or they hired financial advisors who weren't acting in their best interests.

I feel physicians deserve much better investment and financial advice from their financial advisors -- ideally from someone who walks in their shoes, has made the same mistakes and is willing to go to bat for them just like we put our best effort forward for patients.

So I decided to become a financial planner for doctors.

This is a passion of mine. I know firsthand the hard work and dedication it takes to be a doctor -- because I am one -- and I can personally relate to the challenges you face. My goal is to help fellow physicians like you make smarter decisions with your money, get closer to your own financial independence, and start making work optional.

I really encourage you to sign up for your **FREE Financial Consultation** with me. I think you'll find the consultation to be valuable to you. It's a relaxed conversation where we'll talk about your frustrations, concerns, challenges, and goals and come up with an action plan to start carving your path to financial success. Just follow the prompts on this page to sign up.

So that's a little bit about me. I'd enjoy hearing your story and connecting with you during your **FREE Financial Coaching Session**.

Thanks and hope to hear from you soon!

Setu Mazumdar, MD, CFP®, RICP®

Physician Wealth Solutions - "The Doctor's Prescription For Making Work Optional"

[CLICK HERE: SCHEDULE YOUR FREE FINANCIAL CONSULTATION](#)

WELCOME TO A HIGH TOUCH CLIENT EXPERIENCE!

Do you have a systematic process for managing your finances? Now you do.

Explore how we'll work together and how I can add value to
you

[CLICK HERE: SCHEDULE FREE FINANCIAL COACHING SESSION](#)

Here's What We'll Do When We Work Together



- Whip your finances into shape
- Get and keep your financial house in order
- Protect, enhance, and transfer your wealth
- Make smart decisions about your money
- Minimize or avoid costly mistakes
- Start making work optional
- And more!

Protect your wealth through insurance planning and risk management

- Do I have enough liquidity?

- And more!

Enhance your wealth through investment and retirement planning

- What is the proper mix of investments for my unique situation?
- How much risk should I take to achieve my long term financial goals?
- How do I tax manage my investment portfolio?
- How much money do I need to retire so I don't outlive my money?
- What retirement vehicles should I use to fund my retirement?
- Coordination with CPAs and accountants
- And more!

Transfer your wealth through education and estate planning

- What documents do I need to protect my family and my assets after I die?
- How do I minimize the impact of death taxes?
- How do I title my assets to efficiently transfer those assets to my loved ones?
- What options are available to me to fund my children's education?
- Coordination with estate planning attorneys and legal professionals
- And more!

**Some of the above services will require the assistance of other professional advisors such as insurance specialists, CPAs/accountants, estate planning attorneys, and others*

My Core Values To You*

Creating a great client experience begins with adhering to certain core principles. Here's what we'll achieve when we work together.

Organization

Accountability

Help you follow through on financial commitments, work with you to prioritize goals, show steps you need to take,

and regularly review progress towards achieving your goals

Objectivity

Help you avoid emotionally driven financial decisions, consult with you at key moments of decision-making, managing and disclosing any potential conflicts of interest

Proactivity

Anticipate life transitions, be prepared for them and create an action plan to address them

Education

Explore knowledge needed for your financial plan to succeed by understanding your situation, providing resources to help make your decisions, and explain options and risks of each choice

Partnership

Work collaboratively with you not just for you with complete transparency and be your financial coach

**Core Values philosophy is based on Mitch Anthony's ROI to ROL framework (www.mitchanthony.com)*

Here's How We'll Strive To Achieve All of That

#1: Interact To Create and Implement Your Goal Based Financial Plan

- We'll work together to create and adapt your financial plan on a regular basis using interactive tools
- We'll create various scenarios to model events which can derail your finances and proactively discuss steps to address those events

WILL YOU BE ABLE TO ACHIEVE YOUR GOALS?

GOALPLANNER

Probability of Success

- 82% - 100%
- 70% - 81%
- 0% - 69%

This analysis illustrates the potential results of your financial plan using 1000 randomly generated market returns and volatility called trial runs.

	CURRENT SITUATION	SAVE MORE ▾	STOCK MARKET CRASH ▾
Probability of Success	76%	89%	29%
LIFESTYLE			
Income	\$300,000	\$300,000	\$300,000
Expenses	\$276,000	\$252,623	\$250,808
Savings	\$24,000	\$54,000	\$54,000
RETIREMENT			
Retirement Ages	62/62	62/62	62/62
Living Expenses	\$110,000 / year	\$110,000 / year	\$110,000 / year
COLLEGE, KATIE ...			
Years	2022 - 2025	2022 - 2025	2022 - 2025
School	Princeton University	Princeton University	Princeton University
Annual Cost	\$55,832 / year	\$55,832 / year	\$55,832 / year
COLLEGE, HARR...			
Years	2018 - 2021	2018 - 2021	2018 - 2021
School	University of Georgia	University of Georgia	University of Georgia
Annual Cost	\$22,064 / year	\$22,064 / year	\$22,064 / year
LEAVE TO HEIRS			
Amount	\$0	\$0	\$0

DO YOU NEED TO SAVE MORE OR CAN YOU RETIRE EARLIER?

DECISIONCENTER

[Go to Presentation](#)

Selected Plan
Base Facts ▾

TECHNIQUES

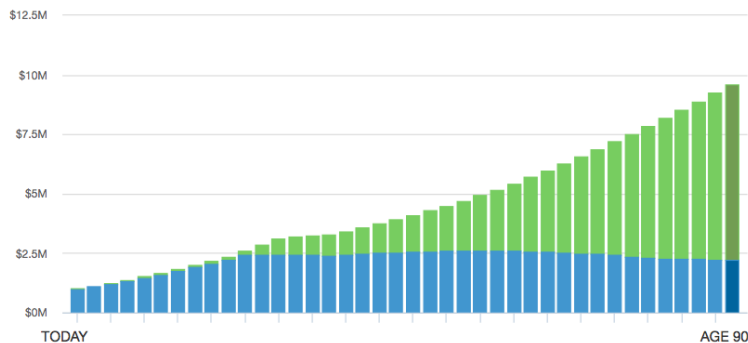
[Modify](#)

- Retirement Ages ▾
 - Retirement Ages 58
 - Retirement Ages 60
 - Retirement Ages 64
- Living Expenses ▾
 - Living Expenses decrease \$10,000
 - Living Expenses decrease \$20,000
 - Living Expenses increase \$10,000
- Annual Savings ▾
 - Annual Savings increase \$10,000
 - Annual Savings increase \$20,000

Selected Report

Lifetime Cash Flow ▾

[View in Present Value](#)



ASSETS LAST UNTIL Age 90	FUNDING GAINED 0 Years	VALUE GAINED +\$7,388,988
------------------------------------	----------------------------------	-------------------------------------

Details by Year: 2055

#2: Organize Your Entire Financial Life With Your Personal Wealth Management Website

- You'll get your own personal website to organize all of your finances -- you'll be able to see what you have, where it is, and what it's worth all in one view
- You'll see everything you own and everything you owe -- consolidated, visualized, and updated daily
- We'll track your spending and cash flows to hold you accountable
- You can store all your important financial documents securely in your personal online vault
- You can access your website on your mobile phone anytime anywhere

VIEW YOUR ENTIRE FINANCIAL LIFE ON ONE PAGE...UPDATED DAILY

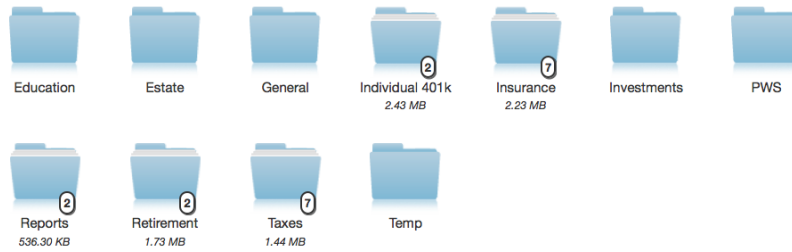
The screenshot shows a comprehensive financial dashboard for Setu Mazumdar. The top navigation bar includes Home, Organizer, Spending, Investments, Vault, Reports, Help, Settings, and Sign Out. The dashboard is divided into several key sections:

- Profile:** Setu Mazumdar, Office: (404) 386-7641, All Contacts.
- NET WORTH:** TODAY \$693,750. A line chart shows growth from August to April.
- INVESTMENTS:** TODAY \$349,289. An asset allocation pie chart shows: International (24.14%), Large Blend (19.93%), Small Value (17.87%), and Emerg Mkts (12.20%).
- ACCOUNTS:** A list of accounts including Cash (\$142,388), Credit Cards (-\$8,746), Investments (\$349,289), Life Insurance (\$0), Loans (-\$596,461), and Property (\$830,000).
- SPENDING:** NET \$35,705. A pie chart shows spending categories: Mortgage & Rent, Unclassified, and Auto & Transport. Total spent this month is \$9,206.
- BUDGETS:** A section to automatically create a budget based on recent spending averages, with a 'Create a Budget' button.
- PROTECTION:** A table listing Term Life (SBLI) policies for \$1,000,000 and a Personal Long Term Guardian policy for \$10,000 Monthly.
- MOBILE:** A section promoting mobile access to the financial picture, with a 'LEARN MORE' link and a smartphone image.

STORE ALL OF YOUR IMPORTANT FINANCIAL DOCUMENTS

vault > Shared Documents

Upload Files Create Folder Download All

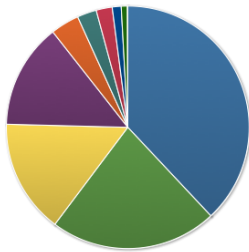


KEEP TRACK OF INCOME, SPENDING, AND SAVINGS

Overview Budgets Transactions Settings

Date Range: This Month View: Spending by Category Accounts: All Accounts Reset All

Income: **\$44,910.74** Expenses: **-\$9,205.50** Net: **\$35,705.24**



[view related transactions](#)

	Spending	Budgets
Mortgage & Rent	\$3,499.33	--
Unclassified	\$2,047.46	--
Auto & Transport	\$1,394.75	--
Food	\$1,289.37	--
Insurance	\$351.67	--
Bills & Utilities	\$236.69	--
Cash/ATM	\$197.25	--
Gifts	\$110.00	--
Shopping	\$73.73	--
Fees & Charges	\$5.25	--
Total:	\$9,205.50	\$0.00

UPDATE YOUR NET WORTH, ASSETS AND LIABILITIES DAILY

Report Selection Balance Sheet Favorites

< Prev As of Today Next >

View Categories: No

Web Print

Balance Sheet

Prepared for Frank and Joanna Miller

The Balance Sheet shows the value of your assets and liabilities, and your net worth.

Assets	Frank	Joanna	Joint - ROS	Total
Cash Account at Vanguard	--	--	\$25,000	\$25,000
Every Day Checking	--	--	9,365	9,365
Frank and Joanna Joint Investment Account	--	--	266,538	266,538
Frank's 401K	441,836	--	--	441,836
Joanna's 403B	--	143,509	--	143,509
Joanna's Roth IRA (converted)	--	103,431	--	103,431
Home	--	--	850,000	850,000
Vacation Mountain Home	--	350,000	--	350,000
Cars	--	--	60,000	60,000
Investment property	--	--	500,000	500,000
Jewelry	--	35,000	--	35,000
Whole Life Policy on Frank	35,500	--	--	35,500
Total Assets:	477,336	631,940	1,710,903	2,820,179



■ Cash Equivalents (1.22%)
 ■ Taxable Investments (9.45%)
 ■ Qualified Retirement (20.76%)
 ■ Roth IRAs (3.67%)
■ Life Insurance (1.26%)
 ■ Real Estate (42.55%)
 ■ Personal Property (21.10%)

#3: Manage All Your Investments...No Matter Where They're Located...All In One Place

- We'll integrate your 401k and other retirement plans no matter where they are located into a holistic investment plan
- You'll see the performance and allocation of your entire portfolio -- updated daily
- We'll employ evidence based investing and use academic studies and financial science to guide investment decisions not guesswork and speculation
- We'll use an evidence based investment philosophy and adhere to these 5 principles: own the entire market, diversify broadly, keep product costs reasonable, minimize taxes, and stay the course

VIEW ALL OF YOUR INVESTMENT ACCOUNTS IN ONE PLACE

ALL ACCOUNTS
\$2,282,140.00

Overview

MANAGED ACCOUNTS: \$2,282,140.00

Account: Taxable Joint, 401k Fidelity, Individual 401k, 457 Lincoln, Roth IRA, 401k, 401k, Roth IRA, Individual 401k, 401k Fidelity

Asset Category: US Large, US Small, International Large, International Small, Emerging Markets, Real Estate, Bonds, Balanced, Cash and Equivalents

Market Value	Units	Price	Percent
\$738,871.67	--	--	32.36 %
\$200,212.14	--	--	14.48 %
\$171,586.05	--	--	7.52 %
\$163,216.15	--	--	6.02 %
\$150,549.09	--	--	6.59 %
\$103,391.92	--	--	4.53 %
\$465,885.20	--	--	19.97 %
\$32,773.51	--	--	1.44 %
\$22,502.00	--	--	0.98 %
\$2,282,140.00			100.00 %

YOUR ADVISOR: **SETU MAZUMDAR, MD, CFP®**

404.266.7641 | setu@physicianwealthsolutions.com
 6778 Lufkin Ridge Ct | Lee Njays, NJ 08149
 Schedule appointment | Physician Wealth Solutions
 Send a file or document to me here
 Emergency Wealth Site Portal Access
 TD Ameritrade Institutional Access
 ByAllAccounts Access
 Disclaimer

KEEP TRACK OF YOUR INVESTMENT CONTRIBUTIONS

- Exchange Out
- Dividends and Capital Gains
- Dividends and Interest Reinvested
- Advisory Fees Paid
- Misc Fees
- Market Value Decrease
- Ending Market Value

\$176,183.04
\$0.11
\$7,642.80
-43,824.83
-933.36
-87,524.51
\$1,562,377.34

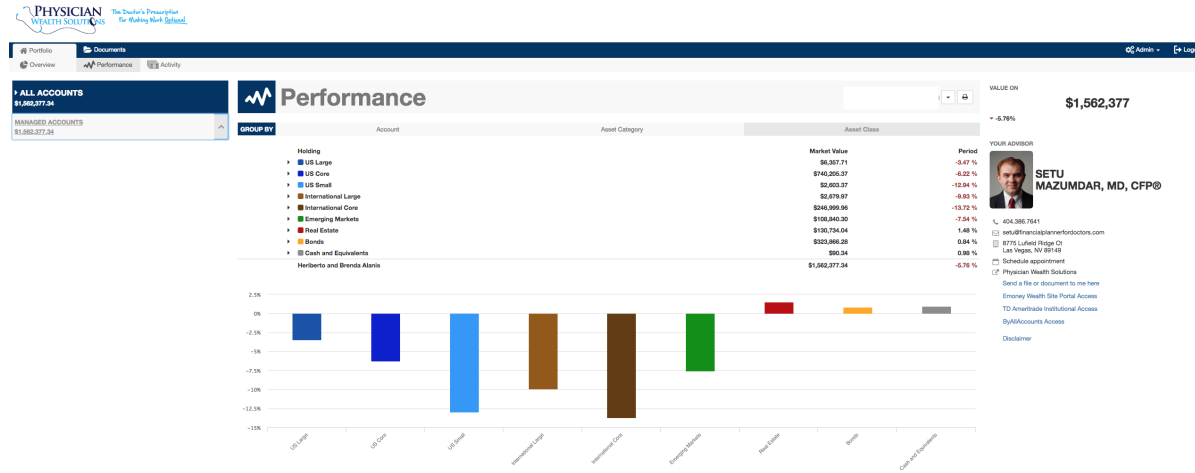
YOUR ADVISOR



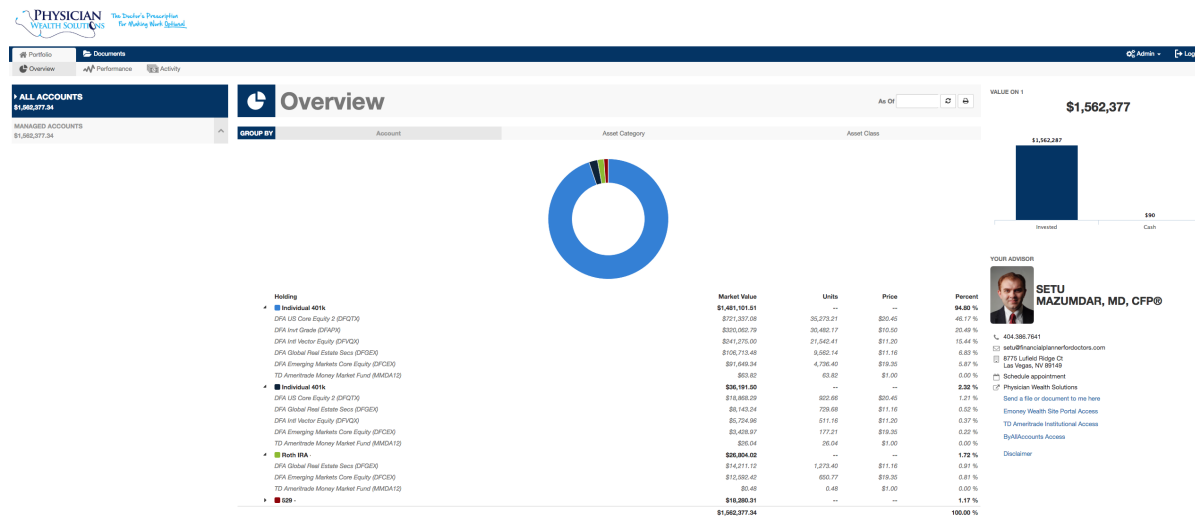
SETU MAZUMDAR, MD, CFP®

- 404.386.7641
- setu@physicianwealthsolutions.com
- 8775 Lufkin Ridge Ct Las Vegas, NV 89149
- Schedule appointment
- Physician Wealth Solutions
- Send a file or document to me here
- Emergency Wealth Site Portal Access
- TD Ameritrade Institutional Access
- ByAMAccounts Access
- Disclaimer

VIEW YOUR ENTIRE PORTFOLIO PERFORMANCE...UPDATED DAILY



VIEW ALL OF YOUR INVESTMENT POSITIONS ACROSS ALL ACCOUNTS



#4: Collaborate With You Through Personal One-To-One Coaching Sessions

- We'll create a structured and regimented approach throughout the year to review and implement your plan

my online calendar system so I can dedicate my time only to you

- I'll reach out to you proactively for regular review sessions as well

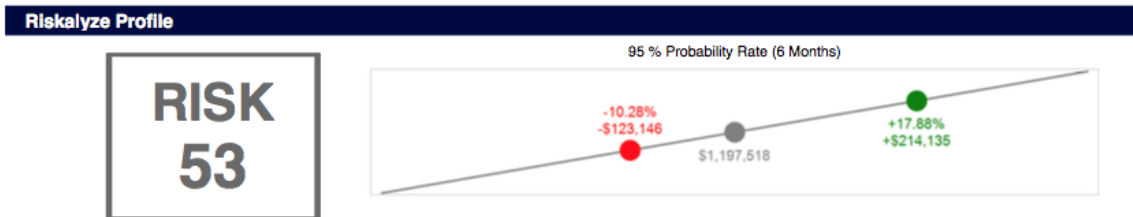
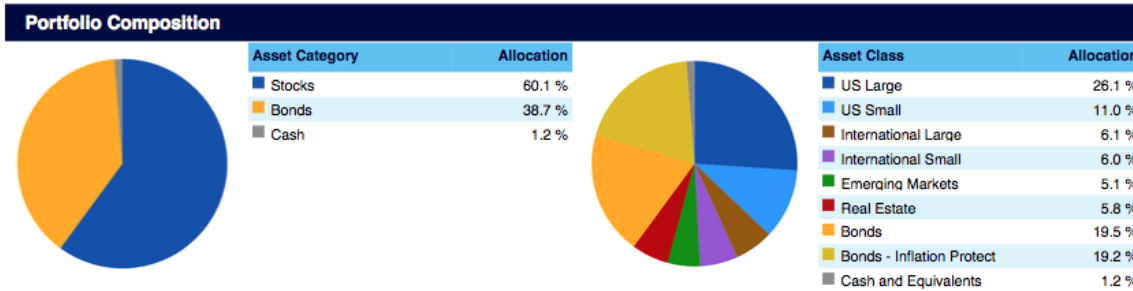
WE'LL REVIEW YOUR PORTFOLIO WHEREVER IT'S LOCATED

Quarterly Report

Household:

Period:

Performance Evaluation	
Portfolio Value on 7/1/18	\$0.00
Contributions	\$1,225,212.36
Distributions	\$0.00
Advisory Fees Paid	(\$2,974.68)
Miscellaneous Charges	(\$69.93)
Dividends and Interest	\$6,577.48
Realized Gain/Loss	\$1,291.34
Unrealized Market Value Increase/Decrease	\$13,871.88
Total Fees	(\$3,044.61)
Portfolio Value on 9/30/18	\$1,243,908.45
Total Gain/Loss after Fees	\$18,696.09
Time Weighted Return for 0.25 Years	1.53 %



Individual Account Summary

Portfolio Name	Account Number	Beginning Market Value	Net Cash Flows	Ending Market Value	Gain/Loss	Period
		\$0.00	\$1,183,043.68	\$1,201,610.23	\$18,566.55	1.57 %
		\$0.00	\$42,168.68	\$42,298.22	\$129.54	0.43 %
Total:		\$0.00	\$1,225,212.36	\$1,243,908.45	\$18,696.09	1.53 %

WE'LL USE A STRUCTURED APPROACH TO REVIEW YOUR FINANCES AND IMPLEMENT CHANGES AS NEEDED

Client Meeting Agenda

1. General
 - a. What has changed?
 - b. Any sale of assets?
 - c. Any changes in your family, career, or health?

2. Accounts and contributions
 - a. Review all existing investment accounts: type of account, balance, ownership and beneficiary
 - b. Review possible consolidation of accounts (rollover and transfers) and existing transfers in progress
 - c. Review/add new accounts to BAA for new 401k, 403b, or other employer sponsored retirement plan accounts
 - d. Review previous year contributions to all accounts: IRA, Roth IRA, 401k, 403b, 457, individual 401k, taxable, HSA and any other accounts
 - e. Determine remaining contributions to all accounts for previous year and deadlines
 - f. Review current year contribution limits for all accounts and deadlines: IRA, Roth IRA, 401k, 403b, 457, individual 401k, HSA and any other accounts
 - g. Discuss timing of current year contributions: lump sum, ad hoc, or regular/automatic
 - h. Matching formula for employer sponsored retirement plans

3. Goals, Retirement, and Projections
 - a. Define baseline goals
 - b. Create scenarios and what ifs
 - c. Show baseline projections
 - d. Create initial reports: Goal Planning and Decision Center, and any other pertinent reports
 - e. Address Social Security

WE'LL MAKE SURE YOU'RE ON TRACK TO REACH YOUR GOALS

Joe and Mary Miller ▾
Traditional

OVERVIEW FACTS **PLANS** REPORTS VAULT 👤 ⌂

Go back to Plans

DECISIONCENTER

Go to Presentation

Selected Plan
Base Facts ▾

TECHNIQUES Modify

Retirement Ages ⌵

- Retirement Ages 58
- Retirement Ages 60
- Retirement Ages 64

Living Expenses ⌵

- Living Expenses decrease \$10,000
- Living Expenses decrease \$20,000
- Living Expenses increase \$10,000

Annual Savings ⌵

- Annual Savings increase \$10,000
- Annual Savings increase \$20,000

All On · All Off

ADVANCED TECHNIQUES Advanced

No techniques added

Selected Report
Monte Carlo ▾

PROBABILITY OF SUCCESS

● 0% - 60% ● 70% - 81% ● 82% - 100%

PORTFOLIO ASSETS

View in Present Value

	Percentile	Portfolio Assets
Upside	97.5%	\$41,682,510
Median	50.0%	\$8,175,790
Downside	2.5%	\$3,511

This Monte Carlo analysis illustrates the potential results of your financial plan using 1000 trial runs.

←

Setu Mazumdar

60 Minute Call

Times are in Pacific Time - US & Canada

Select a Day

← Tue Jun 21 Wed Jun 22 Thu Jun 23 Mon Jun 27 Tue Jun 28 Wed Jun 29 Thu Jun 30 →

5 WEEKS OUT | 6 WEEKS OUT

← Before Jun 21 After Jun 30 →

#5: Communicate With You Regularly Through Exclusive Client Content

- You'll get exclusive access to the private client site where I'll post multimedia educational content -- including videos, special client webinars, audios, teleseminars, and articles -- all to help you succeed
- You can watch the video or download the audio and listen to it on mobile devices
- I'll send you regular email communication on various financial planning and investment topics that are important to you
- I'll cover a wide range of financial planning topics you're concerned about and present them in a way you'll understand

Ready to Get Started?

[CLICK HERE: SCHEDULE YOUR FREE FINANCIAL COACHING SESSION](#)

LET'S GET IN TOUCH

Questions?

Send a message or call

For general questions, fill out the form and we'll be in touch:

NAME

EMAIL

PHONE

MESSAGE

Send

//

LOCATION

Las Vegas, NV 89149

OFFICE HOURS

Monday - Friday

7AM - 3PM PST

CONTACT

info@financialplannerfordoctors.com

(404) 386-7641

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