Fiduciary Fee-Only Financial Planning and Investment Management

# With a Specialization in Physicians and other Healthcare Professionals

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# INDEPENDENT, FEE-ONLY FINANCIAL PLANNING & INVESTMENTS

At Wealth Care LLC, our goal is to help you achieve your goals and dreams through highly personalized,full-service financial planning and investment management. As independent, fee-only advisors, we sell no products, make no commissions, and work only for you.

# CONCIERGE-STYLE SERVICE

We understand that life doesn't just happen between 9-5, so we are here to offer advice when you need it. That means if something comes up and you need an answer on a Tuesday evening, or a Saturday morning, we are not only available to talk, we encourage you to be in touch.

Financial and Investment Services Designed to Care for You

GET STARTED

# Financial Planning & Investment Management Services

What We Do

Why Fee Only

Fees

## COMPREHENSIVE FINANCIAL PLANNING & INVESTMENT MANAGEMENT

We work with people on a long-term basis as partners in achieving the things that are most important to them in life. We provide coordinated financial planning and investment management services, and consulting on areas such as tax planning, asset protection, and estate planning.

## VIRTUAL FINANCIAL SERVICES

# Our Team

About Us

Affliations

## Steven D. Podnos MD, MBA, CFP®

Steven Podnos is the principal of Wealth Care, LLC. After obtaining his MD from the University of Florida, Steven went on to complete a residency and fellowship in pulmonary medicine at the University of Texas Southwestern Medical School.

After completing his medical training, Steven practiced pulmonary and critical care medicine in Central Florida. During this time, he always had a strong interest in personal finance and managed money for family and friends. After many years, Steven decided to make his passion his career.

Steven went on to earn an MBA and a CFP®, and soon after opened Wealth Care LLC in 2002. Wealth Care LLC is a fee-only Registered Investment Advisor that now advises 130 families nationwide. Steven is a Lieutenant Colonel and Flight Surgeon in the US Air Force Reserve. He was also named as an official CFP Board ambassador in 2014. Steven wrote and published the book "Building and Preserving Your Wealth," which is available for purchase on Amazon.

## Rachel E. Podnos JD, CFP®

FINANCIAL PLANNER

Rachel Podnos obtained both her bachelor's degree and law degree from the University of Florida, where she was a Gator cheerleader. Following law school, she became a member of the Florida Bar and obtained her CFP® destination while working for a fee-only investment management firm in the Washington, DC area. Rachel joined Wealth Care LLC in 2014 as a financial planner.

Wealth Care LLC and lives in Melbourne Florida.  He has a Bachelors Degree in Banking and Finance and is a Financial Paraplanner Qualified Professional™ through the College for Financial Planning. He is pursuing the CFP certification and is a competitive powerlifter.

## Lauren Podnos CFP®

FINANCIAL PLANNER

Lauren Podnos obtained dual Bachelors degrees in Finance and Marketing from Florida State University.  She studied the CFP® curriculum at Georgetown University in Washington, D.C. and is a CFP Certificant.  Lauren has worked in the financial industry in Washington DC, New York City, and is currently based out of Austin TX.  She has worked at financial institutions such as Fidelity Investments and TIAA.  She joined Wealth Care LLC in 2017 as a fee-only fiduciary financial planner.

# Financial Planning and Investments for Doctors, Dentists and Medical Professionals



## From Residency Through Retirement

WE UNDERSTAND YOUR UNIQUE FINANCIAL NEEDS

Although we do not limit our practice to medical and dental practitioners, we have unique interests and experience in working with them, from residency through retirement.

Steven Podnos MD CFP® was in a full time practice of Pulmonary/Critical Care Medicine for over twenty years, ran a Hospitalist program, and still practices medicine on a limited basis in the Air Force Reserve.

Rachel Podnos JD CFP® brings a unique perspective with both legal and financial planning expertise to help review the many legal and liability issues associated with medical and dental practices.

Please see our "In The News" section for many articles addressed at the medical and dental professions. We'd love to hear from you!

# Guiding You To Financial Security

SCHEDULE A CONSULTATION



# In The News

June 21, 2019

Medical Economics - Financial Success Tips From A Physician

June 3, 2019

FA Magazine - Do Annuities And 401(k) Plans Mix?

May 31, 2019

CFP Let's Make A Plan - Financial Planning For Entrepreneurs

March 29, 2019

Op-Med - Why I Try To Live FIRO, Not FIRE

# Florida Today

December 31, 2018

Information, Knowledge And Wisdom When It Comes To Financial Planning

November 26, 2018

Thinking About Incapacity And Financial Planning

October 23, 2018

Some Important Considerations For Retirement

September 17, 2018

What About History? It's Key When Considering Financial Planning

August 13, 2018

How Much Life Can You Buy With Your Money

# Monthly Investment & Financial Commentary

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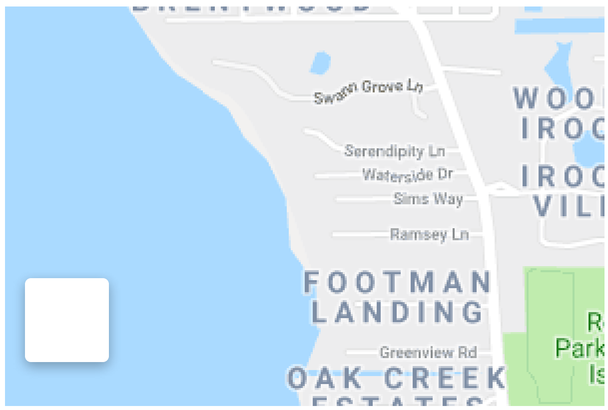
## Ready to Start the Conversation?

LET'S GET STARTED

# Contact Us Today

## With three locations in Brevard County, FL, Austin, TX, and Washington, DC, to serve you better we work with people nationwide.

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