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THE MONEY ISSUE

How to protect pay, build for retirement

PLUS

SAVE TIME
ON PRIOR AUTHORIZATIONS

CONQUER
HIGH-DEDUCTIBLE HURDLES

UBM

PICK YOUR PATH
BUY VS. LEASE

2016 Financial Advisers for Doctors

Contact Name	Firm	City & Contact Info	Credentials, Certifications and Degrees	Minimum Portfolio	Association(s)	Assets Managed	Yrs Exp	Fee and/or Commission Based
 David Keith Sebastian	"Physicians Wealth™ Management Group	Summit • 908-608-9800 dsebastian@physicianswealth.com www.physicianswealth.com	CFP®, CRPC	$500K	FPA	$100M	37	Fee Based, Commission Based
 Howard Hook	EKS ASSOCIATES Fee Only Comprehensive Financial Life Planning	Princeton • 609-921-1016 hhook@eksassoc.com www.eksassoc.com	CFP®, CPA	No Minimum	FPA	$66M	20	Fee Only
Jamal L. Mahmood	Access Wealth Planning, LLC	Roseland • 973-740-2400 jmahmood@awplan.com www.awplan.com	CFP®, ChFC®, CLU®	Flexible		$30M	16	Fee Based
Ken Schapiro	Condor Capital Management	Martinsville • 732-356-7323 info@condorcapital.com http://www.condorcapital.com	CFA®, MBA	$250K	CFA Institute	$846M	28	Fee Only
Brian M. Picariello	Traust Sollus Wealth Management, LLC	Princeton • 609-779-6700 bpicariello@tswealth.com www.tswealth.com	CFA®, CPA, PFS	Flexible	FPA, AICPA, CFA Institute		17	Fee Based
New Mexico								
Travis H. Flandermeyer	The Doctor's Financial Resource	Albuquerque • 505-717-1111 Travis@CeteraNetworks.com www.doctorsfinancialresource.com	MBA	No Minimum	FPA, FSI	$55M+	8+	Fee Based
New York								
Marian B. White	LEXCO Wealth Management, Inc.	Tarrytown • 914-468-8902 mwhite@lexcowealth.com www.lexcowealth.com	CFP®, AIF®, MBA	$750K	FPA	$48M	25+	Fee Based
Michael W. Mustico	Mustico Financial Group, Inc.	Elmira • 866-380-3500 Michael@MusticoFinancial.com www.MusticoFinancial.com	CPA, JD	Flexible		$100M+	15+	Fee Based
Ronald W. Rogé	R.W. Rogé & Company, Inc.	Bohemia • 631-218-0077 info@rwroge.com www.rwroge.com	CFP®	$1M	FPA, NAPFA	$230M	30	Fee Only
Steven Abernathy	The Abernathy Group II Family Office	New York • 212-293-3499 SAbernathy@abbygroup.com abernathygroupfamilyoffice.com	$1M	CFA Institute, RIIA			30+	Fee Based
Lawrence B. Keller	Physician Financial Services	Woodbury • 800-481-6447 Lkeller@physicianfinancialservices.com www.physicianfinancialservices.com	CFP®, ChFC®, CLU®, RHU®	No Minimum	FPA, MDRT, NAIFA, SFSP		26	Fee Based, Commission Based
Albert J. Zdenek, Jr.	Traust Sollus Wealth Management, LLC	New York • 212-661-8682 azdenek@tswealth.com www.tswealth.com	CPA, MBA, PFS	Flexible	AICPA		34	Fee Based
North Carolina								
 Giles K. Almond	Matrix Wealth Advisors, Inc.	Charlotte • 704-358-3322 galmond@matrixwealth.com www.matrixwealth.com	CFP®, CIMA®, CPA, PFS	$1M	FPA, NAPFA, AICPA, IMCA	$256M	38	Fee Only