Stribling~Whalen
Financial Group

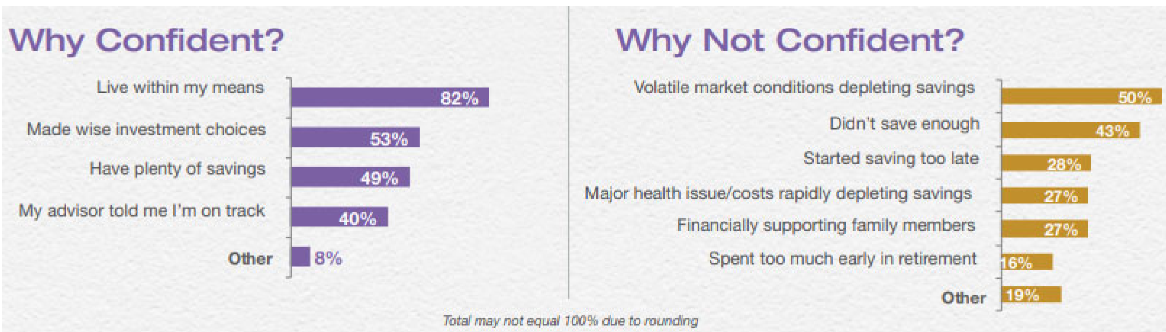
RAYMOND JAMES®

AMA Survey – Confidence in Retirement & Working with an Advisor

If we could narrow a physician's satisfaction in retirement to one thought, what would it be?

For the majority of physicians, they want to feel confident in their savings lasting throughout retirement while being able to weather the unpredictable.

Per the AMA why are physicians confident that their retirement funds will last? Why are they not confident?



We use our Marathon Roadmap Process (on back) to help clients feel confident about their retirement. This confidence is attained by living within their means, wise disciplined investing with long term goals in mind, and developing a plan together. We also make sure to address normal concerns or questions of market volatility, investment selection, and saving/spending amounts.

Physicians in the AMA Survey summed their thoughts on using a Financial Advisor into the following quotes:

- "Be realistic about your spending. If you don't have a good advisor, **find one who can save you from yourself** when you get anxious about the stock market.
  - Most of what we do is coaching, teaching and providing education in order to assist you in making the best decisions.

- "Look for an advisor who will serve as a fiduciary. The advisor needs to be a good listener and ask the tough personal questions to help you stay realistic, putting your best interest ahead of their financial gain."
  - Listening is our most important skill. Followed by asking the next best question. By listening and asking additional questions, we can learn the most about you and your situation.

- "Make sure you have a plan – be confident in it, and stick with it."
  - While having a plan is important, life happens, and we try to stick to the plan as best as possible, but when something does occur, we will find the best way to get back on track to achieve your goals.

We would love to partner with you to help you feel more confident in your financial plan. By having meaningful conversations, Stribling~Whalen Financial Group can help determine what financial confidence means, identify financial goals and create a plan to help you achieve both. Call us at 678-989-0048, or visit our website at www.striblingwhalen.com to begin a journey to financial confidence.

You save lives. We simplify yours.

The advisors at Stribling~Whalen Financial Group (SWFG) provide comprehensive investment planning strategies to a wide range of clients including over 35 physicians.

Our marathon mission

Pre-training preparation

Begin the planning process and discuss:

- Life goals and dreams
- Priorities
- Concerns and Opportunities
- Current situation

Marathon roadmap process

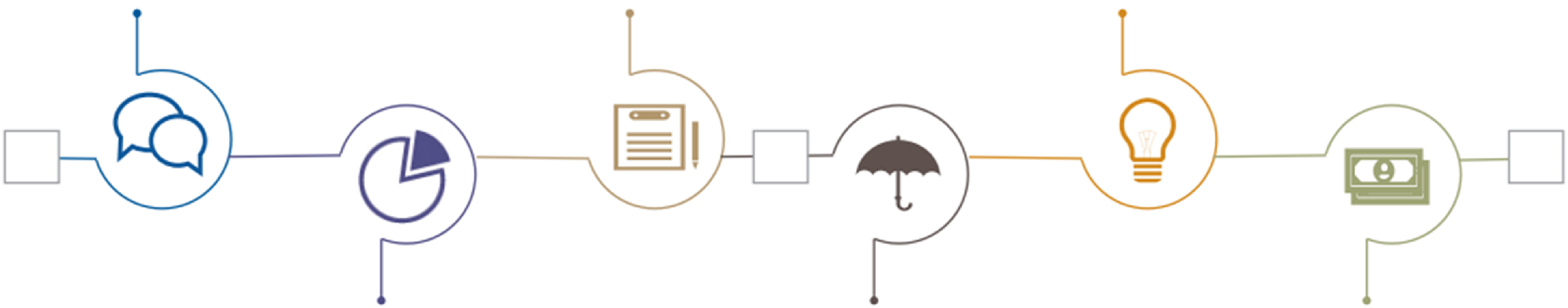
Formalize your plan

- Portfolio construction - current vs. recommended
- Manager selection
- Debt management
- Employee benefits review
- Net worth statement

Pre-marathon preparation

Retirement encore, Medicare and legacy

- What is your encore?
- Medicare strategy session
- Housing



Investment philosophy synchronizer

Calibrate and manage investment expectations

- The markets and you
- Investment discipline
- Activity and inactivity

Family security training

Insurance and estate review

- Life, disability, property and casualty review
- Everplans
- Will, power of attorney, and health care power of attorney

Marathon income plan

Creating your retirement income plan

- Saving vs. spending
- Social Security strategy
- Retirement income preparation
- Retirement income maintenance

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