

	WEALTH ADVISORY	HEALTH ADVISORY
ASK AND EVALUATE CURRENT STATE	Financial goals, interests, expectations	Health status, medical conditions, prognosis
ANALYZE	Financial profile, lifestyle objectives, risks	Health history, diagnoses, treatment, preferences
DEVELOP A PLAN	Tax and retirement planning, trusts and estate preparation, cash flow accounting	Benefits optimization, advance directives, claims management
LEVERAGE EXPERT CAPACITIES	Intellectual capital, expert experience, strategic networks	Renowned specialists, policy insights, integrative hospital networks
STRATEGIES AND SOLUTIONS	Asset allocation, investment, equities, alternative strategies	Provider referrals, second opinions, care transfers, innovative treatments
ONGOING SERVICE AND COUNSEL	Personal counsel, adjustments to investment plans, financial projections	24/7 availability, patient advocacy, follow-up care accountability

**Great healthcare doesn't just happen.
Let's create your plan for better healthcare, together.**

John M. Samuels
Founder, CEO

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