

Medical Economics®



SMARTER BUSINESS. BETTER PATIENT CARE.

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Financial

Advisor GUIDE *for physicians*



PRACTICE MANAGEMENT

Disaster prep for your practice

Be ready for any emergency
that comes for your business

LEGAL

Cyber liability insurance

What you need to know

CHRONIC CONDITIONS

Managing respiratory conditions













Help patients in a post-COVID world

TECH

Turn cancellations into revenue

Here's how

SPECIAL REPORT **Financial Advisor Guide** FOR PHYSICIANS

Advisor name	Firm	City and contact Info	Company primary business	Years of experience	Minimum portfolio	Fee structure	Total assets managed
M I C H I G A N							
 Charles Zhang	 A Fee-Only Wealth Management Group	Portage • 269-385-5888 charles.zhang@zhangfinancial.com https://www.zhangfinancial.com/	Financial Advisor	30	\$1M	Fee Only	\$4B
M I N N E S O T A							
Ben Kirchner	MD Financial Advisors	Chanhassen • 888-256-6855 ben@mdfinancialadvisors.com https://mdfinancialadvisors.com/	Financial Advisor	6	No Minimum	Fee Based	\$115M
Josh Lantz	MD Financial Advisors	Chanhassen • 888-256-6855 josh@mdfinancialadvisors.com https://mdfinancialadvisors.com/	Financial Advisor	11	No Minimum	Fee Based	\$115M
 Matt Morehead	 CAPITAL MANAGEMENT	Rochester • 507-206-2811 matt.morehead@carlsoncap.com www.carlsoncap.com	Financial Advisor	15	\$1M	Fee Based	\$2.3B (the firm)
Katherine Vessenes	MD Financial Advisors	Chanhassen • 888-256-6855 katherine@mdfinancialadvisors.com https://mdfinancialadvisors.com/	Financial Advisor	30	Flexible	Fee Based	\$115M
N E W Y O R K							
 Ronald W. Rogé	 R.W. Rogé & Company Member of the R.W. Rogé & Company Group	Bohemia • 631-218-0077 info@rwroge.com https://www.rwroge.com/	Financial Advisor	35	\$1M	Fee Only	\$300M
 Marian B White, CFP® AIF®	 BIRCHFIELD PARTNERS	Tarrytown • 914-882-4974 mwhite@birchfieldllc.com https://birchfieldllc.com	Financial Advisor	30	Flexible	Fee Only	\$46M
N O R T H C A R O L I N A							
 Damon G. Lichtenberger	 NORTH STAR Resource Group Changing Lives. Forever®	Durham • 919-908-2457 damon@northstarfinancial.com https://www.northstarfinancial.com/find_an_advisor/damon-lichtenberger/	Financial Advisor	18	Flexible	Fee Based	\$100M
O H I O							
Kevin M. Doll, MS, CFP®	Hamilton Capital	Columbus • 614-545-4009 kmd@hamiltoncapital.com https://hamiltoncapital.com	Financial Advisor	20	Flexible	Fee Only	\$3B
Michael P. Faieta, CFP®	Hamilton Capital	Columbus • 614-545-4011 mpf@hamiltoncapital.com https://hamiltoncapital.com	Financial Advisor	23	Flexible	Fee Only	\$3B
Peter S. Geldis, MBA, CFP®	Hamilton Capital	Columbus • 614-545-4017 psg@hamiltoncapital.com https://hamiltoncapital.com	Financial Advisor	15	Flexible	Fee Only	\$3B
P E N N S Y L V A N I A							
Donald L. DeMuth	Mighty Oak Strong America Investment Company	Mechanicsburg • 717-790-9001 ddemuth@investwithmosaic.com investwithmosaic.com	Financial Advisor	19	\$100K	Fee Only	\$261M
 Chad Chubb, CFP, CSLP	 WEALTHKEEL LLC financial advisors	Philadelphia • 267-590-9533 chadchubb@wealthkeel.com https://wealthkeel.com/	Financial Advisor	10	No Minimum	Fee Only	\$30M

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