



MEDIQUIS
ASSET ADVISORS, INC.

"Results. One client at a time."®

SECOND OPINION SERVICE

A Critical Service
for Your Nonprofit
Organization.



Results. One Client at a Time.

IN THIS CHALLENGING ECONOMY

In this challenging economy, you may be in a complex situation or just unhappy with the advice from your organization's financial advisor—it's not uncommon.

We believe that many nonprofit organizations should have a second opinion on how their reserve or foundation assets are managed.

To help organizations achieve their financial goals, we have created a complimentary second-opinion service. We're pleased to offer your board the financial guidance and service experience that is necessary to contribute to the long-term success of your organization.



RESPONSIBILITIES TO THE ORGANIZATION'S PORTFOLIO

There are few areas of financial counseling that generate more interest and emotion than the investment of assets. After all, the successful accumulation and management of an investment portfolio will help provide the means to accomplish your organization's unique goals.

Generally speaking, board members and executive staff have certain responsibilities in handling their reserve or foundation investments. Unfortunately, these responsibilities are often overlooked because of career demands or simply because of a lack of available resources. These responsibilities are:

Fiduciary Responsibilities

- To **manage the impact of inflation** and avoid a consistent loss of purchasing power.
- To **maximize the total rate of return** of the investment portfolio while keeping within an acceptable level of risk.
- To **control investment expenses** as efficiently as possible.
- To **monitor investment performance** and philosophy.



OUR CONSULTATIVE PROCESS

Over the past 20 years, many organizations we come across do not have a strategy that sufficiently provides a safety net for their funds. Or worse, they do not have ANY formalized investment strategy.

We follow a collaborative process. This allows us to have an open dialogue to learn about your organization’s specific values and goals while working with you to tailor alternative strategies. Our investment process will focus attention on the most important elements of investment performance to allow you to be more efficient with your time.



WHAT TO EXPECT FROM OUR SECOND-OPINION SERVICE

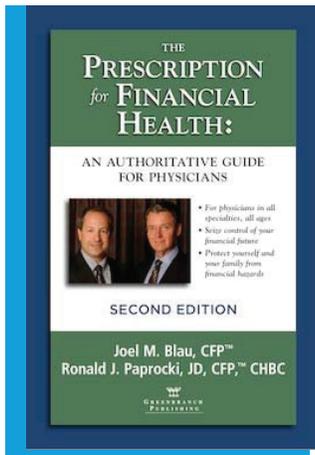
We will meet with you for a Discovery Meeting. At this session we will learn as much as possible regarding the board’s accomplishments, goals and current strategies. Then we will “stress test” your current portfolio to determine the feasibility of a successful outcome.

Hopefully, we can confirm it is on track to achieve your financial goals in a manner that is consistent with the organization’s values. If needed, we will suggest ways in which we can help, including recommending another provider if we are not a good fit for the organization’s needs. Either way, you will receive a personalized analysis of the organization’s current situation.

Publications

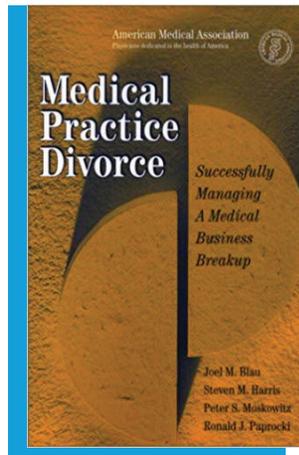
The Prescription for Financial Health:

An Authoritative Guide for Physicians.
Greenbranch Publishing; Second Edition 2014.



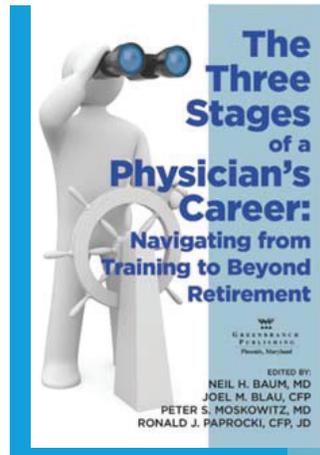
Medical Practice Divorce:

Successfully Managing a Medical Business Breakup. American Medical Association Publishing



The Three Stages of a Physician’s Career:

Navigating from Training to Beyond Retirement. Greenbranch Publishing





**LET US HELP YOU.
CONTACT US TODAY.**

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