How Suncoast Advisory Group Helps Medical and Dental Professionals, and Family Business Owners Enhance their Financial Well-Being

SuncoastAdvisoryGroup
Serving Medical Professionals
Dental Professionals
and Family Businesses

WHY I DO WHAT I DO

Growing up, I witnessed firsthand the pain financial stresses caused my hard-working parents. So, at an early age, I made a commitment to living a happy life with no money worries. I soon realized my passion and my life purpose was to help others minimize their money worries while enhancing their quality of life.

That insight led me to a career in the financial planning industry. But I soon discovered that financial success doesn't eliminate stress: it just changes it. To learn how to add more value for my high-income clients, I studied psychology, life coaching, happiness and life-satisfaction —in addition to learning advanced planning and investment management strategies.

Over the years, I integrated my unique knowledge and skills into a comprehensive five-stage financial life planning process.

I now use this holistic process to help my clients maximize their financial independence and optimize their quality of life.

PEOPLE WHO BENEFIT MOST FROM OUR SERVICES

For more than 25 years, Suncoast Advisory Group has provided financial and investment planning to owners of medical and dental practices, and family businesses. We help our clients organize, simplify and manage their businesses, investments and personal finances.

Our clients average around 45 years of age and have achieved high levels of success in their businesses or professions. They value expert advice, strategic planning, relationships, long-term thinking, financial success, happiness and life satisfaction.

EACH OF OUR CLIENTS IS UNIQUE, BUT THEY ALL WANT:

- A lifelong relationship with an expert financial advisor who cares about them and understands their goals, dreams, concerns and priorities
- To never have to worry about their financial security
- A proven process for making well-informed decisions about integrated business, finances and investment
- Help with planning, growing and operating a profitable and rewarding business
- To make the big decisions and have competent professionals take care of the details
- To make a positive difference in the world

Our clients want to build highly profitable businesses that support happy, meaningful and fulfilling lives!

WHY: "I started my firm because of my passion to help people solve their financial problems and achieve their goals and aspirations"

HOW: "By understanding my clients before the numbers. Nothing inspires me more than helping clients turn someday dreams into reality."

WHAT: "I provide a personalized financial life plan powered by a client's personality and aspirations."

Rick O. Helbing CFP®, ChFC

rick@suncoastadvisorygroup.com
suncoastadvisorygroup.com

UNDERSTANDING
YOU BEFORE
THE NUMBERS

SuncoastAdvisoryGroup
Serving Medical Professionals
Dental Professionals
and Family Businesses

WHAT MAKES US DIFFERENT

One of the reasons Suncoast Advisory Group has built such strong relationships with clients is because we go beyond the basics of financial planning and investment management. We help our clients create a more financially secure life through behavior coaching and financial life planning.

While most advisors focus on managing money and investments, we focus on helping our clients achieve their key financial and personal goals. This means we meet with them in person to understand their biggest challenges.

Whether you're a doctor who is overworked and needs help hiring physician assistants to create more free time, or a dentist who is concerned with catching up for retirement in a hurry, we create a customized plan to help people like you achieve true wealth.

Coupled with our ongoing support and your personal family financial website, your financial life plan can help you focus on necessary daily practices and behaviors to stay on track with your strategies and better reach your long-term goals.

HOW TO GET STARTED

We are committed to providing a financial life planning experience that goes beyond what conventional firms offer. We enjoy meeting with physicians, dentists and business owners to learn about their aspirations and see how we can help.
If you're a dentist, physician or family business owner who is approaching a major life milestone, has questions about your financial journey or would like to chat about your future retirement, we'd be happy to schedule a complimentary financial consultation.

Contact our office today via email at rick@suncoastadvisorygroup.com or by phone at 941.320.5532.

Rick O. Helbing CFP®, ChFC

Mailing address:
15 Paradise Plaza #354
Sarasota, FL 34239

Office address:
1911 N. Lakeshore Dr.
Sarasota, FL 34231
941.320.5532 office

rick@suncoastadvisorygroup.com
suncoastadvisorygroup.com

Connect with Rick!

25YEARS+
OF DEDICATED SERVICE

UNDERSTANDING
YOU BEFORE
THE NUMBERS