



1200 Mount Kemble Avenue
Morristown, NJ 07960
973-425-8420 • 800-877-5264
Fax 973-425-8434
www.regentatlantic.com

Case Study – February 12, 2009

“I hate being a doctor!” Dr. Stan comes from a medical family where he inherited the oral surgery practice started by his Dad over 40 years ago. When we met Stan, we asked, “Have you thought about retiring?” “Sure, every day,” Stan replied. “But I assume I have to keep going until I’m 70, like my Dad.”

We were able to show Stan that there were other paths, if he wanted to take them. Using our [Family Financial Model](#), we created a roadmap of his financial future. We accounted for earnings, expenses, investment returns, taxes, inflation and more. Those special items like a vacation home in the mountains and his 2 daughter’s college expenses were also included. Our planning showed him that he could accomplish all his goals, if he worked for 10 more years. In 10 years he would be 60 and would happily take a different path than dear old Dad.

Important Disclosure:

RegentAtlantic Capital does not provide legal, tax, or accounting advice. To the extent that a reader has any questions regarding the applicability of any specific issue discussed above to his individual situation, he is encouraged to consult with the professional advisor of his choosing. Moreover, you should not assume that any discussion or information contained in this presentation serves as the receipt of, or as a substitute for, personalized investment advice from RegentAtlantic Capital.

Please note that the case study above was selected to demonstrate the type of analysis that we would traditionally perform for our clients. The selection was not based on any portfolio performance criteria. Additionally the client is not endorsing our services and may or may not have a positive experience with our firm.