



THE  
**PARTNERS  
GROUP**

## PHYSICIANS ADVISORY SERVICES

A division of The Partners Group focused solely on the needs of physicians.



Patients need someone they can count on.  
When it comes to your financial well-being, so do you.

A close-up, profile view of a female doctor with brown hair, wearing a white lab coat and a blue stethoscope. She is looking down and writing on a clipboard with a blue pen. The background is plain white.

We take care of those  
who take care of others.

## PHYSICIANS. SURGEONS. THOSE WHO'VE PLEDGED AN OATH TO HELP AND HEAL.

For more than 20 years, The Partners Group has helped physicians safeguard their financial future with unmatched expertise in insurance, investments, retirement and employee benefits. We were made to protect and advance your financial well-being. Over the past two decades, we've helped more than 20,000 physicians manage debt, optimize cash flow, save for the future and protect all they've worked so hard to earn.

We're more than specialists in the financial well-being of physicians.  
We're specialists in helping you achieve peace of mind.



## A prescription for today's challenges.

Whether you're fresh out of medical school, in the midst of an exciting career or on the cusp of retirement, you have challenges unique to your profession. And your life.

When you're caring for others, it's easy to lose sight of what it means to take care of yourself. We'll help you make sense of the ever-changing financial landscape and find the clear path to your goals.

Need a financial reality check? A plan to trade student loan debt for ongoing savings? A validation that your finances are as ready for retirement as you are? No matter where you are on life's journey, we're there with the tools, expertise and experience you need for a healthy financial future. And because we do everything from insurance to investments to financial planning, you have a single source to help you be ready for whatever's around the next bend.



## And tomorrow's dreams.

### Our CV.

Thinking about putting us to work for you?  
Consider our qualifications.

Rooted in the Northwest, The Partners Group has grown to become one of the nation's largest providers of insurance, investments, retirement planning and employee benefits to physicians and clinics. We're an endorsed partner of the Oregon Medical Association. We've provided customized solutions, one-on-one attention and extraordinary service to physicians and clinics for more than 20 years.

Perhaps most important, we serve as a trusted financial partner. Making the complex simple. Helping you manage debt, cash flow and benefits. Advising on key areas of your life that others may overlook.

Who else understands what it takes to run a busy practice? How to protect unusual personal assets like a rare wine collection? How to mitigate the risk of lawsuits—or your new teenage driver? As the region's leader in physicians advisory services, we're uniquely positioned to help you do something extraordinary: understand your unique risk exposures and care for your financial well-being as passionately as you care for others.

# Our holistic approach.

You could have an investment advisor, a commercial insurance expert, an individual insurance expert, a financial planner and a benefit advisor. Or you could have an expert advisor who offers all that. And then some.

## FOR PHYSICIANS, WE OFFER:

- Financial and retirement planning
- Debt and cash flow management
- Investment advisory services
- Disability, life and long-term care insurance
- Individual medical/Medicare health insurance
- Home, auto, boat, motorcycle and umbrella insurance

## FOR MEDICAL CLINICS, WE PROVIDE:

- 401(k) retirement and deferred compensation plans
- Medical insurance and self-funded health plans
- Dental insurance and self-funded dental plans
- Flexible benefits plans
- Voluntary benefit programs
- Short- and long-term disability programs
- Life and accidental death coverage
- Business owners' policies
- Data breach coverage
- Employment practice liability
- Directors' and officers' liability
- Fidelity bonds for pension plans
- Commercial umbrella liability
- Workers compensation

A single source for all of these needs means more than one-stop convenience. It means multi-specialists who see the big picture, provide a clear view of what you have today and what you'll need tomorrow, and chart a course for helping those two paths meet.

## Give your finances a check-up.

You've worked hard to get where you are, investing years of education, dedication and sacrifice. Make sure those investments reap the rewards you deserve.

Our dedicated team of professionals is 100% focused on serving physicians and clinics. Join the more than 20,000 physicians we've helped protect their assets, grow their savings and plan for retirement.

Call and ask for one of our dedicated Physicians Advisory Services team members or email us today at [pas@tpgrp.com](mailto:pas@tpgrp.com).

Ph: 503.241.9550

Toll Free: 800.434.4662





THE  
**PARTNERS  
GROUP**

The Partners Group

Physicians Advisory Services Practice Leader

CARRIE MCHALE, Managing Director

cmchale@tpgrp.com

Ph: 503.726.5668



[www.tpgrp.com/pas](http://www.tpgrp.com/pas)

#### Portland

11740 SW 68th Parkway, Suite 200  
Portland, OR 97223  
Ph: 503.241.9550  
Toll Free: 800.434.4662

#### Lake Oswego

5 Centerpointe Dr., Suite 500  
Lake Oswego, OR 97035  
Mailing address: Same as Portland  
Ph: 503.241.9550

#### Bellevue

11225 SE 6th St., Suite 110  
Bellevue, WA 98004  
Ph: 425.455.5640  
Toll Free: 877.455.5640

#### Bend

730 SW Bonnett Way, Suite 3000  
Bend, OR 97702  
Ph: 503.241.9550  
Toll Free: 800.434.4662

#### Bozeman

PO Box 4783  
Bozeman, MT 59772  
Ph: 406.539.5919  
Toll Free: 800.434.4662

Endorsed by the Oregon Medical Association since 1995 and a partner of the Oregon Medical Group Management Association (OMGMA) since 1996.



Securities offered through Geneos Wealth Management, Inc.  
Member FINRA/SIPC.  
Advisory services offered through TPG Financial Advisors, LLC,  
a Registered Investment Advisory Firm.