



THE LIFE BEHIND THE FINANCIAL PLAN

THE IMPACT PRIMER

Diagnose the life you want before prescribing a financial plan.

Taking control of your financial life shouldn't begin with projections, products, or portfolios. It should begin with the life you want your money to support. Use these questions to step outside the daily demands of medicine and reconnect with what all your hard work is meant to make possible.

15 MINUTES • TWO PERSPECTIVES • ONE SHARED DIRECTION

Answer separately. Then compare what matters most, what feels misaligned, and what you want to protect.

I IMAGINE

Picture yourself at 80 years old, sitting in the setting of your dream home.

You look back at the life you built and think: 'We were successful because...' What five things complete that sentence?

M MEANING

Why are you choosing to take control of your money now? What would 'getting it together financially' make possible for you and your family?

P PURPOSE

Who are you beyond your title, income, and career? What brings you joy? What do you want your life story to be about - and are you giving enough time to it now?

TURN CLARITY INTO COMMITMENT

Name what your success is for. Then choose the time and actions that will bring it to life.

A ABUNDANCE

Who or what do you want your success to positively affect beyond your household?
Consider the people, causes, communities, or missions that matter to you.

C CONTRIBUTION

What will you be able to give because you took control of your money?
Think beyond dollars: Time · Attention · Presence · Experience · Leadership · Freedom

T TIME

What consistent amount of time will you commit to building and maintaining your financial life?
We will dedicate _____ minutes every _____ to this process.

OUR TAKE CONTROL PLEDGE

We are committed to intentionally building a financial life that supports the people we love, the experiences we value, and the impact we seek to make.

We understand that commitment means doing what we said we would do long after the mood we said it in has passed.

PARTNER 1

DATE

PARTNER 2

DATE

Money is not the destination. It is a tool for building a life well lived.

Ready to see the whole picture?

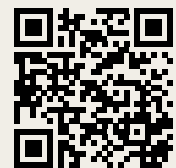
You may not need more financial information. You may simply need someone to uncover what is falling through the cracks, organize the complexity, and show you where to begin.

The Physician Financial Wellness Diagnostic is a complimentary conversation designed to help physician families replace uncertainty with clarity and financial drift with a coordinated plan.

BOOK YOUR COMPLIMENTARY DIAGNOSTIC

SCHEDULE MY FINANCIAL WELLNESS DIAGNOSTIC

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SCAN TO BEGIN