

Cramer's 5 Components of a Compelling Advisor Story

1 | What You Do

"I help doctors stay focused on being good doctors by helping them get and keep their financial house in good order...so they can do what they do best, which is keeping their patients healthy."

2 | How You Do It

"I take a financial planning approach that focuses on the five keys to a doctor's financial health. First I drill down into each of the five keys in great detail and make sure they are each in good order. Then I make sure all five keys don't conflict in any way and in fact work together to support each other."

3 | Why You Do It

"I only work with doctors because I've learned that they are often more focused on their clients' health than their own financial health. And I believe that if I can help them not worry about their money, they can be a better doctor for their patients."

4 | Make It Real with an Example

"I got into this business because my father was a doctor and he struggled to get his finances in order. He was so focused on his patients, that he didn't get his own financial house in order. His only answer was to work harder and that took a toll on him personally...and our family. He never had someone he could trust to help him get and keep his financial house in order so he didn't have to work so hard."

5 | Make It Personal

"And when I'm not doing that, I spend all my free time raising my three kids, two cats and one dog on the north side of Columbus."