



MD Preferred
Services



WINTHROP
PARTNERS

Wealth Planning & Investment Management

MD Preferred Recognizes

Thomas Saunders, Brian Werner, Ryan Carney and William Sands

Each year, US Medical Specialties, Inc., an international medical consulting firm, helps physicians and other healthcare professionals find community based, “doctor friendly” financial professionals. Winthrop Partners has been recognized by MD Preferred for their service to physicians.

Every MD Preferred affiliated professional is recognized for their commitment to serving the healthcare industry. They often work in close concert with other community-based professionals helping area medical providers attract and retain talented physicians and medical staff. Financial Advisors who display the MD Preferred Service Medallion are uniquely qualified to act as recruiting partners to area practice managers and hospital administrators. These knowledgeable professionals can tell the community story while the medical recruiter focuses on the clinical opportunity. Their understanding of the special needs of physicians and their families saves everyone time and resources.”

According to the Bureau of Labor Statistics, there are approximately 700,000 physicians in the United States who work in excess of 60 hours per week. A blizzard of government regulations and a host of clinical and economic issues leave little time for a doctor to manage their professional and personal lives. When it comes to finding a provider that is committed to working with physicians, they appreciate a resource that has done the research for them and has pulled a team together to make their lives easier.

Winthrop Partners (www.winthroppartners.com) is a super-regional Registered Investment Advisor and Wealth Planning firm with Offices in suburban Philadelphia, PA Pittsburgh, PA and Buffalo, NY. We focus on the healthcare, the healthcare education and business communities in these areas. Winthrop is a Fee-Only Fiduciary by SEC mandate and by culture. Furthermore we have gained appointment to NAPFA, the prestigious National Association of Personal Financial Advisors and we strictly adhere to their high standards of behavior and practice. As Fiduciaries we put our medical professional clients’ interests first, provide them with top-tier wealth management services to them and where applicable, vigorously negotiate on their behalf.

Thomas Saunders is a managing member of Winthrop Partners. He has over thirty years of experience in the financial services industry with some of the nation’s largest and most highly regarded firms. His background includes senior management positions in the investment management, trust, wealth management, private banking, private equity, mergers & acquisitions, and commercial banking fields. Tom is based in the Doylestown, PA office.

Brian Werner, CFA, CFP® is a Managing member of Winthrop’s Partners in its Pittsburgh office. Brian has over 20 years of experience in investments and financial planning. Most recently, Brian

served as First Vice President of First Niagara's Western Pennsylvania Private Client Services. Brian is a Chartered Financial Analyst and assists with investment research and portfolio management.

Ryan Carney is the Business Development Director for Winthrop's Buffalo office. He earned a degree in Economics from Bowdoin College and is passionate about investing and personal finance. Ryan assists with investment research and portfolio management as well as providing financial planning for clients in Western New York. He is currently pursuing a CFP designation.

William Sands is a Business Develop Director for Winthrop's Doylestown Office. He is a lifelong resident of Bucks County and a 1983 graduate of Temple University. Prior to joining Winthrop, Bill enjoyed a successful management career in the banking industry. In 2010 Bill re-orientated his career trajectory becoming a financial advisor. While on this path he gained invaluable experience at some of the nation's most prestigious firms.

"We are proud of the recognition we have received. In an environment of critical physician shortage, we understand that most physicians considering a career in our community will make their decision based partly on life style issues. The last thing we want to have happen is for that prospective physician to go elsewhere because the local support services he or she needed were not available, were unreliable or did not meet the expectations of the physician." – **Thomas Saunders**

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