Nobody cares for your money like you and RG Capital

Rober Graham, founder and owner of RG Capital, had a vision: to create an atmosphere where businesses and individuals would be able to prosper in the financial arena. To date, the company has distinguished itself as one that also specializes in working with dentists and dental specialists. As such, the company has worked with practice management firms for four and a half years and been an official Levin Group Alliance Partner for the last two and a half years.

Founded in May 2004 in Scottsdale, Ariz., RG Capital has a team of 10 advisors. These advisors, Graham included, provide wealth management services with the goal of focusing not only on the process of wealth accumulation, but also informing and educating clients about every step used to reach that goal.

This relatively young company now boasts a management portfolio of more than $450 million and numbers some 1,800 clients spread throughout 50 states. Graham attributes RG Capital’s most recent success to its growing client base within the dental industry. Although it specializes in advising dental professionals, its clients range across a broad spectrum — from professional athletes, such as star defense Adrian Wilson of the Arizona Cardinals, to large corporations and middle-income individuals and families.

RG Capital’s clients benefit from working with a company that maintains the variety of resources one would generally expect from a very large institution. The first step in the company’s personalized service entails identifying a client’s visions and goals. Once the RG Capital advisor understands the client’s visions and goals, the advisor will implement the best strategies, tactics and tools to help accomplish the best possible outcome.

Dental clients experience the RG Capital SmartPlan approach. The RG SmartPlan centers on tax avoidance strategies, practice tax savings, income tax savings, efficient investing, investment cost efficiency, accumulation strategies, estate planning and asset protection. This holistic approach has given rise to RG Capital’s rapid growth within dentistry. RG Capital was ranked No. 5 within the Top Ten Fastest Growing Advisory Firms.

Probably the most important factor that ensured the company’s strong success is that from the outset it attracted a highly experienced group of financial professionals who decided to leave much larger companies due to various mergers and acquisitions. In addition, these advisors shoulder all the responsibility for their individual clients. The advisors’ complete responsibility means that there is no “investment big brother” looking over their shoulders and demanding that they push proprietary products that are in the best interests of the company, but not necessarily so for the client.

RG Capital’s independent and open architectural structure allows its advisors to take a client-centered, process-driven approach. The client-centered approach centers on what the client defines as the “best possible outcome.”

“Our investment strategy is based on the values, vision and personal goals; it is what drives our actions. This is in contrast to the cookie-cutter investment approach taught today that categorizes clients’ investment approach based solely on their age,” said President and CEO Robert Graham. Whether one has vast sums to work with or a more modest amount, the key to wealth management is to differentiate between what you want and what you need.

When seeking out a financial advisor to help you down that path, you want one that places accountability and willingness to educate you about the options offered. Graham values strong customer relationships so highly that he was dissatisfied with the customer relationship management systems on the market. So he created his own that now forms the backbone of iNation, a company for which Graham is recognized as the founder.

The atmosphere RG Capital creates for its clients is one of simplification, accountability and reliability. The company’s personalized service includes well thought out timelines for goal achievement and regular reviews to assess progress and make any adjustments in goals.

Whether you own your practice or not, planning your wealth management strategy can be a daunting task. RG Capital has the unique experience and insight you can rely on to help guide you down the path of wealth management that allows you to achieve your short-term and long-term goals.

Financial advice geared toward dentists at the Greater New York Dental Meeting!

Join RG Capital at the Dental Tribune America Symposia from 1:30–3:30 p.m. on Dec. 5. Robert Graham will discuss efficient investing, investment cost efficiency, accumulation strategies, estate planning and asset protection, and many more topics of specific interest to dentists today.

The lecture is free to all CNYDM visitors, but pre-registration is recommended for guaranteed seating. For more information and registration please contact Julia Wehkamp at j.wehkamp@dtamerica.com.

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