

FLORIDA

# DOCTOR

●●●● NORTH FLORIDA EDITION | SPECIAL INSERT JUNE 2013



## WEALTH HEALTH

Peace of mind so you can focus on patient care.



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*By Pam Ibarra*

A first coast company fills an overdue need for our country's physicians and doctors with their specialized wealth management needs. Caduceus Consulting is the company, and their mission is simple: to make doctors lives better. Why choose to help doctors? W. Shane Hunt and Dr. Jason Dyken are the creators of the concept. They both have different beginnings and converged with the same goals in mind, they are making it happen.

**Dr.** Dyken was a practicing physician for over ten years. He was born into a family of doctors and healthcare providers, which was the foundation for his dedication and passion for doctors. "Those that have never been on the provider side of healthcare do not understand the great responsibility and pressure that doctors face" says Dr. Dyken, "they take this responsibility as a priority, often neglecting their own family or individual needs." Unfortunately, Dr. Dyken has also witnessed the misguided advice doctors receive in the financial services industry.

Hunt's dedication and passion came from his experience in 2002 at the height of the medical malpractice insurance crisis. While creating the first asset protection program for the FMA, Hunt witnessed some of the doctors' frustration and fears as legal and financial obstacles continued to mount against them. At this moment Hunt saw the effects it could possibly have on the healthcare community. If doctors were scared

## Dr. Jason Dyken

When Dr. Dyken practiced medicine he had a full practice helping patients, but wanted to also help his fellow practitioners. Dr. Dyken started to do research and attended school at night to learn more about the unique legal and financial needs doctors have. After earning his MBA, and getting licensed, currently with First Allied Securities member FINRA/SIPC, he began to take on wealth planning clients. His goal was to come up with a better service delivery system to help doctors understand these services better.

how would that translate to their patients? Hunt decided to show his support in the most powerful way possible by growing his medical clientele, both empowering and liberating the very people who ease suffering for everyone else

Similarly, when Dr. Dyken practiced medicine he had a full practice helping patients, but wanted to also help his fellow practitioners. Dr. Dyken started to do research and attended school at night to learn more about the unique legal and financial needs doctors have. After earning his MBA, and getting licensed, currently with First Allied Securities member FINRA/SIPC, he began to take on wealth planning clients. His goal was to come up with a better service delivery system to help doctors understand these services better. After earning his MBA, and getting licensed, he began to take on wealth planning clients. Ultimately, he decided he could have more impact patients and doctors alike by becoming a full time financial consultant for doctors. "When you make doctors lives better you positively impact the way they take care of patients," says Dyken. "By doing my job well, I feel I can leverage my efforts and positively impact the delivery of healthcare to more patients than I ever could while practicing medicine."

Dr. Dyken understands that doctors are compassionate individuals and that by having the financial resources and independence available to them they will be able to endow their value systems to society. "The improvement in doctors' lives, the resultant



improvement in healthcare delivery, and the promotion of doctors' value systems to our society will make our world a better place," says Dyken "For these reasons, I am as passionate about my doctor clients' wealthcare as they are about their patients' healthcare." In a way, Dyken doesn't feel his life is all that different. He still diagnoses, monitors, and manages treatment plans and coordinates care with specialists.

Hunt learned his skills a different way. The Caduceus approach harks back to his time in the US Navy. Hunt learned that, as with people, ship-bound problems frequently cut across multiple disciplines. So he actively sought a range of skills, cross-training in three specialties: search and rescue, damage control, and navigation. "This made me pretty valuable to the ship and sharpened my problem solving skills," says Hunt. He learned to look at the big picture and to always keep it in mind when it came to

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doing business and also to pay attention to every detail, as those are the small things that can make a big difference. He integrated all these disciplines into his business, and feels that none of these can be left out while making a comprehensive plan for his clients.

Today, Hunt engages himself by helping clients strike the ideal balance between private comfort and community engagement. He derives the most satisfaction-not when reviewing numbers, but when seeing firsthand the impact he's made on his clients' lives. "It is the best feeling to watch clients build or re-build their confidence and peace of mind," says Hunt. He has watched as his work has helped transform them, their families, and their careers. "I am passionate about what I do and cannot imagine doing anything else."

Their advice to doctors is, that when looking for a trusted financial advocate,

### W. Shane Hunt

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ensure that they are as passionate about their financial planning as they are about the care of their patients. "Just as you have been called to serve as a doctor and charged with the awesome responsibility to take care of those that cannot take care of themselves, search for a financial advocate that has the same calling to care for your financial needs," Dyken and Hunt said.

Their vision is to be the principal wealth management institution for doctors in the country. In the past year they have experienced growth in multiple cities and are forecasting more in the near future. Both Hunt and Dyken were awarded "2012 Best Financial Advisers for doctors" by Medical Economics and "2013 Best Financial Advisers for Dentists" by Dental Practice Report. Hunt was awarded 40 under 40 by The Jacksonville Business Journal, an award given to the most influential people in Jacksonville under the age of 40. They are both involved in their communities, Dr. Dyken serves as a second term City Council member in Gulf Shores, AL and member of the Coastal Resiliency Coalition where he has been instrumental in assisting the local communities heal and rebuild from the BP oil spill tragedy in the Gulf of Mexico. He also serves as Chairman of the City's Finance Committee, Member of the Healthcare Authority, Member of the Airport Authority, Patron for Gulf Shores Elementary School, and Member of the South Baldwin Health Foundation Hunt is in the board of directors for Lifework Leadership in Jacksonville, The National Christian Foundation, and The Jacksonville Beach Life Saving Corp. **FD**

#### For more information



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