Advertising Partner Application

Thank you for applying to advertise with The White Coat Investor. We pride ourselves on connecting our community with the good companies of the financial industry. If that's not your company, don't waste your time:) All partners must be approved before interacting with our community. Please fill out the application below.

Email *

adam.grossman@mayport.com

What is your name? *

Adam Grossman

What is the name of your firm? *

Mayport Wealth Management

What is the address of your firm? *

275 Grove Street, Suite 2-400, Newton, MA 02466

What is the best email for clients to contact you? *

adam.grossman@mayport.com

What is the best phone number for clients to contact you? *

617-545-5700

Please provide the link to your website. *

www.mayport.com

How many years has your firm has been in business? *

6

What designations do you have? Check all that apply.

- [x] CFA
- [ ] CFP
- [ ] ChFC
- [ ] CLU
- [ ] CPA
- [ ] PFS
- [ ] EA
- [x] MBA
- [ ] BS or MS in a related field
- [ ] MD or DO
- [ ] Other:

Have you had any events in the past that are reportable to regulatory agencies? *

- ○ Yes
- ◉ No

Have you had any events in the past that are reportable to regulatory agencies?

Please describe the events that were reportable to regulatory agencies IN DETAIL. *

Lawsuits

Have any of your former clients sued you? *

- ○ Yes
- ◉ No

Have any former clients sued you?

What was the outcome? Please explain IN DETAIL. *

Lawsuit Info

Are you currently involved in a lawsuit by a client or former client? *

- ○ Yes
- ◉ No

Are you currently involved in a lawsuit by a client or former client?

Please describe the lawsuit with details. *

Application

What are you applying for today? *

- ◉ Financial Advisor Listing/Advertising
- ○ Insurance Listing/Advertising
- ○ Tax Strategist Listing/Advertising
- ○ Real Estate Company Listing/Advertising
- ○ Physician Mortgage Lender/Advertising
- ○ Legal Services/Advertising
- ○ Retirement Account Listing/Advertising
- ○ Student Loan Services/Advertising
- ○ Other

Retirement Account Listing/Advertising

What is the AUM fee? *

Financial Advisory Listing/Advertising

How many years of financial experience do you have? *

15

How many years of experience do you have with financial planning or investment management for individuals? *

15

How many physician clients do you work with? *

28

Who is your ideal client? *

Physicians approaching retirement seeking a flat-fee advisor

Please provide the link to your ADV2 if applicable. *

https://www.mayport.com/wp-content/uploads/2023/03/ADV_2A-2B_Mayport-Wealth_20230320.pdf

What services do you provide? *

- [x] Financial Planning
- [x] Investment Management
- [ ] Student Loan Management
- [x] Tax Strategizing
- [ ] Estate Planning
- [ ] Contract Reviews
- [ ] Workplace Retirement Plans
- [ ] Insurance

How do you get paid? Check all that apply. *

- [ ] Commissions on investment products
- [ ] Commissions on insurance products
- [ ] Hourly Rate
- [x] Annual Retainer
- [ ] Flat Fee for Financial Plan
- [ ] AUM Fee
- [ ] Other: ____________________

How much do you charge? Please list your fee structure. If there is a range of possible fees readers can expect to pay, what is the range and what determines where in the range they would fall? If you use AUM fees, be sure to list what a reader would pay with $100K, $500K, $1M, and $2M in assets. *

Individuals: $10,000 per year
Married couples and families: $15,000 per year
Families requiring estate tax strategies: $25,000 per year

What is the minimum amount of assets required for you to take a client? *

There is no formal minimum, but Mayport's flat fee structure makes the most sense for those with more than $2 million in assets.

If you receive payment for insurance product commissions, what percentage of your business revenue do they make up?

NA - no commissions

Do you consider yourself a fiduciary? *

- [x] Yes
- [ ] No

Do you routinely sign a fiduciary agreement with clients? *

- [ ] Yes
- [x] No

Do you use tactical asset allocation (I.e. do you change asset allocations due to market fluctuations or valuations)? If so, please explain your process. *

No.

Do you believe you can time the market sufficiently well to beat a comparable low-cost index fund after your fees? *

- ○ Yes
- ◉ No

Do you pick individual stocks for clients? *

- ○ Yes
- ◉ No

Do you believe most physicians should own a cash value life insurance policy of any type? If so, what type and why? *

No.

Do you believe you can select mutual fund managers who can beat an index fund in the same asset class over the long term going forward? *

- ○ Yes
- ◉ No

What percentage of a typical client portfolio would you place into actively managed mutual funds or ETFs? *

0%

What role do fees play in your selection of individual investments? *

Fees play a very significant role in selecting investments. According to research by Morningstar and others, low fees are one of the only reliable indicators of future performance.

What fund companies do you routinely use? Check all that apply.

- [x] Vanguard
- [ ] DFA
- [ ] Bridgeway
- [ ] iShares
- [x] Other: Life+Liberty Indexes (ticker FRDM)

Do you routinely engage in tax-loss harvesting for clients in their taxable accounts? *

- (•) Yes
- ( ) No

How many clients have you helped with the backdoor Roth IRA in the last year? *

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