

Testimonials

"My experience with My Financial Coach was very valuable. James took the time to understand my unique situation and needs. He was easily accessible, knowledgeable and personable. He evaluated my current status, addressing any gaps, and helped me look down the road to prepare for the future. He was willing to work out different scenarios, as well. I think this is a wonderful opportunity and would encourage other MDVIP affiliates to take advantage!"

- Beth Singer Jacobs, DO

"As a small business owner, My Financial Coach has treated me as a large company. Helping me to balance growing my company, new business ventures, proper personal savings, and getting some protection elements in place. Having a trusted Financial Planner there to provide an unbiased perspective adds a significant value, all at a low cost."

- Chris Leveris

"Dr. Baker & I have been very pleased with our experience thus far, with James Hargrave & My Financial Coach. I have always tried to keep a very good handle on our finances, but this has been especially helpful in allowing us to see the bigger picture... especially as we move toward retirement. I feel that this has been an invaluable service, and would highly recommend others to take advantage of this wonderful service. We are certainly grateful that we did!"

- Dr. James Baker & Mrs. Alisa L. Baker

"Working with My Financial Coach was an excellent experience. I was looking for an advisor who could fill the gaps in my retirement goals. James was able to provide a comprehensive assessment of my investments, insurance and tax liabilities. His evaluation of my current status and recommendations on how to improve my retirement readiness were understandable and actionable. Providing me a plan to implement with my accountant, investment and insurance advisors. My wife and I enjoyed the conversation and knowledge James provided for us."

- Dr. Gregory A. Markway MD

"I signed up for the MDVIP financial planning benefit and am really happy with their process and received lots of value. They used one of their subject matter experts to make a different pension plan recommendation that met my goals. I am happy to endorse My Financial Coach and would encourage others to use it."

- Dr. Lillian Cohn

"I have enjoyed getting to meet James Hargrave who calls me from Phoenix. As I have had to reschedule three times with him, his accommodation of my unpredictable schedule has been a rare benefit... As a single woman and an independent clinician, I more than anyone need an objective perspective and expert advice. James has laid out a plan for me that doesn't include specific stock recommendations, or requests to take over my money and manage investments. He is an active advisor, exactly what I need, who keeps in touch and keeps me on task. He makes me take a more active role, look farther ahead than I am used to, and consider weaknesses I don't anticipate. I look forward to working with him in the coming years and appreciate this opportunity provided by MDVIP. "

- Dr. Pamela Hall



"I've been pleased with how My Financial Coach has been able to help me organize my financial picture and with the practical advice I've received so far."

- Dr. Sachdev

"Since working with My Financial Coach, my knowledge has skyrocketed around important financial topics that I have not considered before. I would recommend that everyone should take advantage of this. Thank you so much!"

- Michael Shapiro

"I must really take the time to give My Financial Coach's April Rohl some exceptional compliments in making the whole process enjoyable. She is upbeat, fun, and positive. She set doable goals for each of our visits and has made some great suggestions for tax and estate planning relevant to my situation. I could not be more pleased with the time I spent with her and the use of the "My Financial Coach" software. I would recommend everyone to embark on this process and plan for the future."

- Steven M Pounders, MD

"James Hargrave has been great to work with as our financial coach. My husband and I have been working with James for several years through our employer. He has been a great help with giving us financial advice and supporting and helping us to meet our financial goals. We look forward to working with James and My Financial Coach for many years to come."

- Tony and Suzy Carnarvon

"I have patients who do not do things I recommend even though they know that is the best way to preserve their health. Likewise, I have been as non-compliant with my financial matters as my patients with their health! Despite that, I continue with My Financial Coach helping (or pushing) me along."

- Bart Sills, M.D

"James... thanks for reviewing my complex situation with me and introducing strategies and experts to help execute. I always felt good about my financials and retirement plan, but after meeting and working with you I feel GREAT, SECURE, and GIVING! During our discussions, you asked me about my dreams and goals. In addition to protecting my family, I told you how important it was for me to leave a legacy of conserved natural land in the nearby mountains that would be enjoyed by the world for all eternity. You showed me how to make it a reality NOW, rather than at the end of my life. My dreams are being realized now, at a time I can actually enjoy them. I feel grateful for you and at peace in a way that words cannot describe! You guys are amazing!!!"

- Michael J. Kaczinski

President and CEO of Sun East

