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ACCELERATING ENTREPRENEURIAL SUCCESS PODCAST

EPISODE  
**72**

**Pat Do**

Show Notes at: <http://www.aesnation.com/72>



**John Bowen and Pat Do**  
**AESNATION.COM**  
Episode #72

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Best of success,



John Bowen  
Co-founder, AES Nation

**John Bowen:** As entrepreneurs, we all have challenges. The biggest challenge is to go out and serve our current clients and our future clients, and build great enterprises that deliver tremendous value. I have a special guest today. He's like many of us. He started out as an extremely talented individual. I like to refer to entrepreneurs as technicians. We have a great skill, whether it's building widgets, whether it's professional services, or in the healthcare industry. So many of us just stop there. We could be solopreneur or we get inside large organizations.

I've asked Pat to join us, because he has done something that very people in the healthcare industry have not. Not only he's a great technician, but he's built an enterprise around helping not only the patients, but his fellow practitioners, the other physicians, to come together and build an organization. This is a huge opportunity for all of us as an entrepreneur. Its how can we make it easy to attract not only great clients or great patients, but create talent. You're going to want to stay tuned. You're going to be amazed with this remarkable individual, and some huge lessons you're going to learn.

Pat Do, I really appreciate you joining me today. It's the end of the day, we're recording this, and you made yourself available. You're an extremely successful entrepreneur, orthopedic surgeon. You've built a very successful practice. I want to get in to it. One of the reasons I reached out to you, Pat, is we're both in strategic coach. When I was talking with Dan Sullivan who's the founder and both of our coaches. I go, "Dan, who's really one of those super successful entrepreneurs who I haven't heard of", and he goes, "Pat. He's right over there, go talk with him right away." Pat, first of all, thank you for making time for us.

**Pat Do:** Thanks for having me.

**John:** You're an orthopedic surgeon. You've built a very successful practice, and you've got a great culture, and I think it resonates, as I've gotten to know you now, with other professionals, what they can do. I want to get to know you a little bit more, so let's go. I'm not thinking you thought of yourself as little Pat has his big entrepreneur, making a huge difference in the medical industry. How did this all come about?

**Pat:** Little Pat got done with his residency or training if you will, John, in 200. I actually grew up in Southern California. I was going to go back there and start up a practice. When you got out back then, I thought I'd go learn how to run a little practice for a few years. What happened is that I really enjoyed having my own practice. I thought we can practice medicine differently. We start out ... I start out running in a small practice. I really enjoyed it and thought we can do a good job and take business concepts into medicine, and take long wait times where people would wait long times in the clinic room, and doctor would make you wait for an hour, and it was okay.

I want to change all that to hospitality, do a 4 seasons type service for our patients, and then grow it. What grew out of me, wanting to just give good service at a small practice. I didn't dream where we would where we're at today. Its funny how just taking care of folks properly can help you succeed.

**John:** Yeah. I want to take a step back. I mean if all of us ... I'm 59, and as you get the age, we get to spend more time than we like with the healthcare industry along the way. The challenge I've had, and as I was listening to you, I don't think in the healthcare industry and the 4 season together very often. It's so much of that is not that ... Certainly not mainstream. We've got some of the high-end concierge groups and so on. I'm in one of those only because I was worried about getting access. There's just an opportunity to revolutionize or transform certainly. You're one of the guys leading the charge of doing it.

I'd like to ... You started on in the small practice. You started getting market feedback for your patients. You're serving them well, you've grown well pass that small practice. Give us flavor of where you are now, and then I want to go in the lessons learned.

**Pat:** In 2000, I take out \$160,000 loan, ad 4 employees, and wearing multiple hats since. Any entrepreneur Dos early on. Sitting here today, we have 4 practice locations. We're the busiest practice in our area, we have MRI at all our locations, service centers. We've got a lot of the sports teams, high schools. We have physical therapy, medications. Now we are about 150 employees or so, I can't do the math much right now, maybe 10, 20, 30 times what we started of doing.

**John:** The market is saying what you're doing. They like this concept, the 4 season, too. When I think of ... I haven't broken anything since high school ports. I remember I was from this small town. There wasn't much there. It's fairly simple. Today, the tools, everything else, the capital, what I'm seeing is so many ... I mean Silicon Valley, so many of the physicians, they're really talented. We're losing brain drain. They're retiring or they're going to the hospitals and working groups there. How can a group...

Initially you, by yourself, and then as you're building it up, really attract the talent to compete with these larger organization.

**Pat:** First of all, I want to recruit great doctors. We have great doctors. The reason we're able to do that is you might have somebody that's a great orthopedic surgeons or any kind of various surgeons, John. If they're not able to practice their skills where they love, which is going to be probably in the operating room or taking care of patients. We can eliminate all the bureaucracy and all the paper work that's making those 59 year old doctors or so forth. They're all retiring right now. They say there's going to be a shortage of good providers of care. You say you're worried about access.

In a way, that is true, because you have a lot of good folks wanting to retire right now, because they're tired of the paper work, the bureaucracy and all the documentation. A lot of the documentations really just red tape, that has nothing to do with providing good care for our patients. If can provide an atmosphere or an environment where our doctors get to be doctors, and that's what they do best, and that's what they love, me included, then I could attract good doctors that provide good care, so patients love it. My doctors, I've been very impressed, not of them are saying they want to retire. They're all optimistic about the future, even though healthcare in the future is uncertain, as we all know. We have a group a doctors that are optimistic, because they just get to practice what they enjoy. That's our major attraction for doctors, and the patients get to notice the benefit of that.

**John:** Pat, one of the things I wanted to share that right away, because some of the listeners or viewers are going to questions. They're going to say, "John, Pat's obviously a very talented entrepreneur in health care. How Dos that work for me if I'm selling widgets or I'm in professional services?" The answer is what we all have is we're scaling up. We have shortage of talent. We want the best talent working with us. One of the key things is making it easy for them to practice their skills. Often, the healthcare, anything revolve around the government, can get bureaucracy and so on.

The more you can isolate those distractions, and bring it in to your entity, and take care of it with people who are really good at that, and then let the technicians, those highly skilled individuals, do well. This is universal, Pat. This isn't just healthcare. You and I are in Dan Sullivan's strategic coach. We hear this over and over again no matter what they're doing.

**Pat:** Right. It's all familiar. Sometimes I think your red tapes more than my red taping. We're on the same both. As entrepreneurs, we can come home at night energized, because we didn't have to do all the things that drain us. From other entrepreneurs to doctors, whoever you are, if you want to succeed, just do what you enjoy, and have the right team around you. It's amazing how lucky I feel of having the right folks surround us. We're able to do so much at health care, real estate. I think in something I read about you, you're a serial entrepreneur. Unfortunately, I might represent that comment to. We're surrounded by bright folks around us, and have appreciation for our team. It's amazing what our team can accomplish.

**John:** You and I are alike on that. I get to do what I love doing, because the only reason is I've got a great team. You've got to get ... You're going to stand on the right side of the line and let them do their stuff. You let the practitioners in each area do it. You've taken that, and we've seen so many other entrepreneurs. I want to come back to the key takeaways as we're going into some of the lessons learned. As you've been doing a combination of strategic coach, one of the things that we both do is we think about thinking a lot in strategic coach. You're building this business, you're scaling it up. What are some of the key lessons that you think your fellow entrepreneurs, no matter what industry they're in, can really benefit from?

**Pat:** One of the takeaways I've got was one of my first classes in strategic coach. I've met a guy named Bruce Burton in manufacturing. We're on our coffee break, and he says, "You know Pat, my concepts in manufacturing should be pretty applicable to human healthcare." I'm thinking, "Healthcare and manufacturing, are you kidding?" He recommended a book called *The Goal* by Eli Goldratt. It talks about the 3 constraints and your bottle necks. We applied that to our service center, to running 2 rooms efficiently, to having doctors see more patients in less time with less effort. They're happier, so patients noticed that happy interaction.

That is probably one of the key moments for me. Before Dan Sullivan, I had another coach named –

**John:** Before you go there, I want to go a little deeper in it. I've had those same type of things. You and I at our coffee break talking. We're very esoteric businesses all over the place. You're talking to somebody selling a whole bunch of herbal medicine, and the next one is building fire trucks, and the next one is professional services. You start thinking you don't have that many things in common. Businesses is business largely. You got to deliver great client experience. You got to have more people want to explore working with you. How did that concept of manufacturing ... You're saying some of the bottlenecks. How did you work through some of those issues that Bruce was sharing with you to get very specific in breakthroughs in your business?

**Pat:** For instance, let's talk about an offering where in sometimes, you'll get a service, we'll go to some hospitals or facilities do serve you that will probably take them say, 10, 15, 20 minutes, 30 minutes, whatever it might be. Then they'll go sit in the doctor's lounge for about another hour, when that room gets turned over, being unproductive. What we took to be more productive is that the surgeon, my time, or whoever surgeon it should be, should be the right step, because our time is the one that's going to be most productive for that hospital, that service center.

What we do is we started ... This was really innovative, now it's a little bit more common, but to run 2 operating rooms. As soon as the surgeon gets done with this surgery, the other patients is already being set for the other one. You may think it's running through a lot of patients, but it's actually much more efficient. Patients don't wait very long. They get better care, and there's less down time for patients. They serve as much more energized and productive, because they're doing the work that they enjoy.

**John:** It's those type of things, taking the step back and examining how can we make it more effective for the client, for the cost to delivery, and a better experience as well. What other lessons learned?



**Pat:** Something that I learned from someone named Lee Brower is the difference between leverage and productivity. Some folks automatically think that's a financial term. I've applied it in medicine, but I really applied to a general business philosophy for me. I don't like to get into a business relationship if it takes a lot of effort and energy, and so forth. I take the term leverage, which I want to do more with less effort. How I translate that in my business, and maybe it's applicable to other folks. In my case, it's nurse practitioners, and physician assistants. In somebody else's case, it maybe somebody go getting the sale and their implementation team.

For me, we get a lot done with less effort, because when I'm sitting in there in the exam room with the patient, I don't have a computer in my hand. I might have a pen, but I'm not even taking notes. I have to scribe there, just doing everything I do not enjoy, which is taking notes, doing paper work. I just get to listen to my patient. When they walk out, their prescription is already sent to their pharmacy, and all the orders for physical therapy or an MRI is right up front for them. For me, that allows me to do what I enjoy. I call that leverage. I can get a lot more done with less effort, because I surround myself with folks to do the things that I don't enjoy.

Then the other key learning point for me is productivity, getting more done in less time. Whereas, in your case or somebody else's case, if you have a producer, John, that wants to produce \$500 an hour, so they make a million a dollars an hour for instance, they shouldn't be doing something that's 10 or \$12 an hour. I'll have ... when I walk out of that exam room, I'll have 4 or 5 folks sitting there, helping me get that patient through. For another entrepreneur it might be an assistance. They can do other things for you that is less ... It cost less than what you want to produce. I had a goal in my mind that I want to make X number of dollars, so I'm going to focus on task that are highly value task that will produce those X number of dollars, if you will.

That allows me to be more productive, by not being penny-wise and pound-foolish. Surround yourself with the folks that can handle the things for you.

**John:** I want to go into that a little bit more, because I think that's ... Actually, I know that affects all of us as entrepreneurs. I'm going to do a personal ... I'll stay in the healthcare first, and then we'll go outside. I had a ... I won't say the name of the organization, but it was one of the best executive clinics here in Silicon Valley. I had one of the cardiologist was my general practitioner. He's about my age, and he just retired, because he got so tired of the paper work part, or now the computer part. He's still teaching at a major university. It's like, why would you let this talent go for really probably, I don't what it cost, 30 bucks an hour to have somebody just follow him around and to the information. If even that ... I don't know, maybe more.

**Pat:** \$12 an hour.

**John:** It's the Silicon Valley, so I'm going a higher number. To lose a talent that's worth thousands of dollars an hour, it just doesn't make sense. Really, in our businesses, all of us entrepreneurs, we have this opportunity to really think through. Should we do it? The answer is very few things you should do. You're not good at that many things. Whatever you're good at, you should do. Everything else that needs to be done could be delegated either internally or externally. There's a thousand dollar or \$10,000 jobs. There is thousand an hour, there is hundred hours, there is \$10 an hour. You've got to decide what you want to price yourself, and then get that out.

This becomes even more, Pat. You and I are talking about individuals. When you're building your organization, you've got a lot of docs working with you. The ability to make them more effective through your leverage and productivity, so that they're serving the right people well. That's where you've got all of these employees helping them along the way.

**Pat:** Absolutely. My products of happy doctors is amazing. We have diagnostic imaging, athletic training, physical therapy, we dispense medications. The byproducts of happy patients and happy doctors are just ... Right now, loving life, the byproducts of that is amazing. The culture and everybody around you is so much more positive. They're happy. I sit around with a bunch of doctors, and most of them want to retire because they're tired of everything, but inside I'm happy. I see all those turmoil, and paper work, and bureaucracy, Its an opportunity for me.

I'm probably one of those guys that just a delusional optimist, whatever. I see a lot of potential out there right now that everyone else is scared and tired of all this and that. To me, if we had the right system, essentially, I think we can really excel if we can take advantage of that.

**John:** I think everyone on here ... What all of us should do is ask ourselves "How could we take advantage of the mess that's going on in the world?" One of the things, Pat, I think you and I will always agree is there's always going to be more mess. We don't know where it's going to show up, or disruptions. We do know there's going to be disruptive technology. We know there is going to be disruptive governments. There are going to be agencies. There are going to be outside forces beyond our control.

We can got so wrapped up on, that we become dysfunctional. We can't move forward, or we can embrace it, and know that we're up for the challenge, and then really create a home for other people, so that we can really build some great businesses with value. That's what you're doing.



**Pat:** Right. The value just goes on and on. It goes from the real estate side to a bunch of other things. The byproducts of our core healthcare ... Actually, it's hard for me to describe. It leads to so many other areas. We have folks asking us now to help them open up their facilities, and their service centers, and so forth.

**John:** Let me ask you Pat. One of the things, I'm a big believer and I know you are too, is about execution. It's one thing to have these concepts we're talking about and how we're going to become more leveraging the concepts and the productivity. How are you making things happen within your group?

**Pat:** To give you a backdrop, I started practice in 2000. 2004, I've fired my uncle and some relatives. I brought in a real cheap operating officer who really hated the books against his ... Arguing with him big time, I brought in a really CFO. John, to answer your question, none of that happen for years, until I had the right team.

I would come up with idea, "Hey, let's do medication dispensing. Let's do this, let's do that." Now, we're a one-stop shop, but it wasn't until we actually had the right team to implement it. That to me is amazing. I'll give an example. Right now, if I don't put the brakes on something, it's magic, it just happens. Our team could execute so quickly, we can out maneuver almost all those disruptive things that come our way, because of the right team.

**John:** This is something that I think all of us as entrepreneurs have to think through is if you're frustrated, and you've got clarity of vision of where you're going, you've got quantified the goals and you've got the overall strategy in place, and you're not making it happen. In the market place, you're getting some positive feedback. You want to make sure you got the right team, because you can move mountains with the right team. I've worked both with not the greatest team. I think I have the best team I've ever had in my life. We keep on starting bigger and bolder initiatives, and the market place responding.

When it doesn't respond, we can pivot a bit, and make it happen, and deliver great client experience, as well as track not only clients, but also strategic relationships. I want to go back to what you were talking about too. It becomes fun. Business should be fun. You had to do some work. It's not 100% fun every moment, but boy, you can have a lot of fun doing this.

**Pat:** It's fun because, John, we're in the people development business, right? We develop teams. We develop people. We help raise their game to where it's counter intuitive. You think as you get really big, and you get bigger, and you're doing this project, that project that is over consuming of your time, but it's actually ... I found just the opposite. I had more freedom today, getting much more done than I ever did, but having nice enjoyable conversation with you right now.

**John:** We both can. We've got a very successful businesses. We can a conversation. We know our team is really making things happen. Pat, tell me how you get ... Let's take the physicians, and then I'm going to call it support team. The support team sometimes, is more important than the talent. Everybody is delivering a lot of value. Maybe, how do you bring, how do you attract to your organization these talented individuals across these different needs that you have?

**Pat:** First of all, I approach it with my own mindset that not that somebody coming onboard, "You're lucky to have a job." I approach it that I'm lucky to have you on our team. What can I do to make this a good place for you? What can I do to help you grow as a person or help you accomplish your goals, so I can accomplish my goals. It's very important for me to make sure that everybody wins, every employee wins, every doctor wins, physical therapist, nurse practitioners, physician assistant. There could never be a loser. I think in our culture, now that we've created our brand, self-referrals from other employees, and word of mouth.

I get calls now from, forget about talent and doctors, but just from almost everybody who want to come join, even from hours away. After you have that reputation that brand for just caring about others and caring about your employees, it really helps attract good talent. I was in the London Business School, John, not too long ago. They talked about how some of the leading banks out there actually pays their employees less, but retain them better because of the culture of appreciation of their employees and how happy they are. Folks will work for less for the right environment.

Ideally, I like us to do so well that everybody gets paid top dollar, which for us that's the case, and yet have a great quality of life. For us, that's pretty key, is appreciation, not that "you're not lucky to have a job", it's "we're lucky to have you."

**John:** The benefits on here ... We go back to productivity. Some of the studies coming out of The Harbor Shawn Achor wrote the book Happiness Advantage. I remember just a happy employee is 30% more productive, all other things being equal. We don't think of that, So many entrepreneurs I know... There was a time when I made this mistake. You think you write the check and you're buying people's behavior. You can buy their behavior, but I want their whole everything, their body, their mind working. If you're going to create a 4 season experience, whether it's in healthcare, manufacturing, professional services, you need the whole ... You're the Ritz Carlton, ladies and gentlemen serving ladies and gentlemen. You need that whole group.

**Pat:** Right, you need them bought in.

**John:** What are some of the stumbling blocks along the way, Pat? Obviously, you've been building your business, during all the healthcare changes. They haven't stopped. The

interpretations of what the rules are and where they may go, it's uncertain. How do you deal with that?

**Pat:** John, first of all, I just know... I can't predict what's going to happen in the future, so I don't try. I try to have the foundation that we can be proactive or reactive, if you will, to any change that comes our way. First of all, I'm not predicting healthcare, but we set up the right people in place that can respond to any changes that we have to be. It's hard to describe, but there's a lot of rules in health care as far as what we call ancillary services that may or may not become something that we can offer in the future, like a doctor with physical therapy in their office for instance. We've set up the ability to separate that out if we needed to, with health care change. I'm not exactly sure that's what you're asking.

**John:** No, no. That's ... I think one of the things that we all have to do is we have to have flexible learning organizations. I know you have that. We look at healthcare, it's one-sixth of the economy now. My guess is there's going to be a need for orthopedic surgeons for a long time. We have friends like Peter Diamandis who ... All these tech guys, maybe they're going to make new bones for us or something. I don't know what it is, to have titanium bones or carbon fiber. Chances are, we're all going to need medical services for the foreseeable future.

**Pat:** Right. Medicine is fun. We actually get to make money serving folks, so it's actually fun. You don't even have to ... We're lucky. We get to help folks and fulfill our higher calling. Then some of the score card or finances is just ... It's on a back burner really, when you just worry about it. For us, at least, we get to do what we enjoy.

**John:** What I love, Pat, you guys deliver tremendous value. This is something, and you can see the results fairly quickly. I love business. Business is capital systems we set up. You do well by doing well by others. It's not just about making money by any means. If you can deliver value ... You and I both I'm sure have friends that, I know I do, that are focused on the money. They're usually the least successful entrepreneurs over the long-term, because they don't build the culture. They don't have the teams. They don't have the relationships with their clients, their customers, their patients.

Let me go. I'm going to go to the back to a segment here. It's the book of the day. Let me pull up it up here. I want you to describe. We went into the concept of manufacturing. We talked about the book, The Goal. I got it up on the screen now, Pat. Why do you... As a matter of fact, you can see on the screen, because I'm pulling up my Amazon account. I bought at July 16th of 2010. I'm going to now go back and reread after what we talked about. Tell me why this was so material to you.

**Pat:** Now, you're going to make me go reread it too, because it's been awhile. A lot of it is just intuitive. Some folks, when they look back, we're a young practice. It's hard to describe them.

I'm the oldest guy in our group right now. We've done so much in such a short period of time, because we did it efficiently. We didn't let those stumbling blocks slow us down. I remembered you ask this a little bit earlier. I still remember trying to do this in 2004, 2008, trying to stay afloat.

When you just keep charging a head and being productive and efficient, and trying to figure out how you can do things better, and figure out what your bottlenecks are, which is the essence of the book, the goal. It was a lot. We can see a lot of patients, in a lot less time. Our doctors can do a lot more surgeries with a lot less effort and time, and get to go home and spend time with their families. A lot of the providers of healthcare nowadays are getting burned out, because they have to take a call, they have to bring their paper work home. He said, "Daddy came home tonight, but all he did was do his charts all night. I don't see my dad. I don't want to go in a healthcare."

Worse, some other kids in our neighborhood, they say, "We want to join group like Pat's, for instance, because see him home, taking a jog at lunch, or being home at 5 with his kids and family, going to the shows." That book has helped get our whole practice much more efficient. When I first started the practice, I thought I worked really, really hard when the first time ever we saw 25 patients a day. I believe last year, I think we saw 60, 70, 80,000 patient. I can't even remember what is exactly now.

**John:** You didn't create more days, right? I'm pretty sure.

**Pat:** We didn't create more days. It's actually less time, less effort, more patients, and happier patients. The book can help, at least for me. At least, it helped me be much more efficient, productive, enjoy more time off, more time with my family. I love my patients, but I don't want to sacrifice my family. This newer generation growing up ... That's where maybe some other entrepreneurs may have some struggle and blocks. The new younger generation growing up they don't feel the same thing that maybe you or I did. They have to be bought in. They have to have freedom. They have to be able to express what's important to them.

The job is not 80 hour work week for them. It has to be, "I still need my time off and my family." The value system is different. Whereas, in the older days, you work for the company, you take call, you work hard, and maybe sacrifice your family. In today's world, I'm trying to attract talent that, "What can I do to make your life better? How can I make it more efficient for you? How can I get you to take the threads that you never got to be able to take? Go out of the country, see this, see that. What can I do for you, and yet I still need my business to run?" Maybe there's way to be more productive.

The book helped our group to be more productive, get more done in less time, figure out what our bottlenecks are, so that all our employees can go play, our docs can play, everybody. It's

not just the doctors. We keep mentioning doctors, but it's a whole team that, I guess do enjoy a more relaxed atmosphere. It's more fun coming to work, because it's not all about work. It's play for them for the most part.

**John:** Pat, you've built a great organization and it's really measured by the satisfaction of the patients, as well as all the employees. The only way it works is both. This has been very powerful. Let me do the key takeaways in this.

Obviously, I've got a whole bunch of notes here. This has been great. Number 1, we talked about. You talked about the conversation with Bruce. The concept of manufacturing have really been systemic in identifying those bottle necks. This is something we all should do. The more successful we are, sometimes, we let them go longer. There's so much opportunity to improve, not only quality experience for our patients, or our customer, or clients, but for our team, and be much more effective in everything we do.

Second thing, understanding the power of leverage and productivity. As we examine all those systems, and what we're building. Getting more done with less effort, more done in less time. It's not trying to maximize the dollar, it's trying to maximize the experience and creating the most value, so that you do well by doing so much value for your clients, customers, and patients. The next is building an organization that attracts the talent. You should ... If you're having a hard time finding people in today's market place, then you don't have the right organization. You've got to build a brand, a culture that is attracting the best of the best, or you're going to fall behind. This is so ... Pat is a great example of that.

Last, it's all about execution is executing on this. This is where bringing together the right executive team, the leadership team, and working with them to implement these ideas. Pat, you have done a great job. I'm going to recommend everybody that they go to AESNation.com, and see all the show links. Matter of fact, what I want to do too ... I didn't put it up, so let me do this. I'm going to change your company, the website. A lot of times there's all kind of resources. These are resources for the patients. If you want to reach out to Pat at Mid-America Orthopedics you'd definitely ... He is an extremely talented entrepreneur.

I'm sure any of the orthopedic surgeons out there are going, "I got to give this guy a call here." In the meantime, Pat, I want to thank you for your time, and then I want to encourage everyone out there. Life is all about execution. Take the information, go through the transcript, mark up the key points, key takeaways on the show notes. You can put this into place with your team. You can create the 4 season of your own business. Wish you the best of success. Your clients, your future, clients, they're counting on you. Don't let them down.

## A Second Opinion on Your Finances

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However, you may not be entirely satisfied. You may be wondering if there's a financial advisor who is better-suited to address your family's very specific financial challenges. If so, you are not alone. In today's uncertain economic climate, many successful entrepreneurs are wondering if they have the right financial advisor.

To help you find out if you are currently being served well, Financial Advisor Select is offering a complimentary second-opinion service to all qualified members of AES Nation. Simply [contact us](#) to schedule an exploratory call with one of our personal financial concierges. We will introduce you to a financial advisor who we believe has the ability to address your particular needs. The financial advisor will then meet with you and provide you with a second opinion on your finances. There is absolutely no cost or obligation to you.

[Find out more about how Financial Advisor Select can help you and your family.](#)

Why do we offer this service? Because at Financial Advisor Select, we have just one purpose: to help successful individuals and families achieve financial peace of mind by connecting them to top financial advisors in their communities. We look forward to assisting you.

Best of success,



John Bowen  
Founder and CEO  
Financial Advisor Select