

CARTE MEDICAL | THE PHYSICIAN ADVISORY FOR THE FOUNDER’S FAMILY OFFICE

STRATEGIC HEALTH ASSET MANAGEMENT AND MEDICAL RISK SECURITY

Markets recover. Clinical errors don’t. They’re one of the most underappreciated risks to generational wealth. While legacy firms deliver *access* to doctors and facilities, Carte delivers *accuracy* — in diagnosis, in expert selection, and in directing effort toward decisions that materially alter long-term outcomes. We function as an independent physician-advisor and clinical diligence layer for superior health decisions.

WHY WEALTH MANAGERS PARTNER WITH CARTE

FOR THE PRINCIPAL (SIMPLICITY)

For the entrepreneur in their 30s-50s, health is the engine of output. We move beyond wellness advice to a custom, tactical use of finite time.

- **Treatment Diligence:** Our research process integrates each client’s unique biology, lifestyle, and genetic data
- **Specialist Briefing:** We interview specialists on the client’s behalf, turning half-day interruptions into immediately actionable plans
- **24/7 Physician Escalation:** Carte physician-orchestrated response for urgent events, ensuring crisis management is strategic, not reactive

FOR THEIR PARENTS (SECURITY)

The most painful resource drain for a founding principal is an aging parent’s or loved one’s medical crisis. We rescue them and those they care for.

- **Care Coordination:** We act as the single point of truth for parents in complex health situations, managing the records and reconciling advice
- **Forensic Audits:** We aggregate raw data from every specialist system to diligence errors and find the linchpin findings standard medicine ignores
- **Fragmented Data Synthesis:** We bridge the gap between hospital systems, ensuring your client’s family doesn’t have to be the case manager

CASE STUDY: STANDARD CONCIERGE VS. CLINICAL ALPHA

- **The Case:** A high-performing CEO in DC needed thyroid treatment. Their \$5k/year concierge doctor deferred to the Johns Hopkins specialist’s initial advice: a surgery with significant risks.
- **The Failure:** Standard medicine is consensus-based and often poorly aligned with individual factors. No one was duly respecting his unique situation and disproportionate risk.
- **Carte’s Intervention:** We found the leading specialist in Boston with extensive case experience in a safer alternative.
- **The Outcome:** We convened the Boston specialist with the Hopkins team, convincing the Hopkins team to change course. The principal avoided an unnecessary surgery and had an excellent outcome. Risk Mitigated. Time Saved.

STRATEGIC ON-RAMP: THE FORENSIC CASE REVIEW (\$10,000)

A *Value-Add for Partner Firms:* Wealth Managers utilize Carte’s Forensic Case Review as a 30-day clinical diligence audit for a principal in limbo with a health question or seeking an objective, spin-free longevity baseline.

- **The Offer:** A firm-sponsored, self-contained forensic clinical audit
- **The Result:** Provides the Wealth Manager immediate status and trust by resolving a client’s health paralysis



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