



## Contact Information

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## Personal Statement

With my background in psychoanalysis, psychiatry and organizational leadership I am interested in the hidden, unconscious and emotional forces that interfere with optimal financial and personal decision making. I like to help investors and individuals and families with wealth make the best possible decisions, avoid habitual and predictable mistakes and use greater self-awareness to bring decisions in line with values, dreams and practicalities. I have special interests in women rising in positions of power and leadership and in the life phase I call "starting older"—what do you do when you're approaching 65 and you've met all your goals but have one chapter left where you want to do something meaningful and impactful to add to your legacy?

<b>Professional Services</b>	Advising on emotional finance, coaching women leaders in finance, managing new wealth, navigating critical career changes, generational transfer of wealth, leadership coaching.
<b>Practice Approach</b>	Individualized advising based on comprehensive model of the mind including neuroscience and psychoanalytic perspectives
<b>Client Focus</b>	individuals, couples, families
<b>Typical Client Profile</b>	Age: Any. Especially interested in business owners 60+ Gender: Either Income: 300K up Net Worth: 5 M up
<b>Licenses/Certifications/Designations</b>	MD, certified in psychoanalysis. Board certified in psychiatry
<b>Education</b>	Yale College, BA, Psychology, University of Michigan MD
<b>Fee Structure</b>	Monthly retainer or project based
<b>Years in Practice</b>	35
<b>Professional Association Affiliations</b>	Financial Therapy Association, Family Firm Institute, American Psychoanalytic Association, American Medical Association, International Psychoanalytical Association
<b>Do you work at a distance such as with Skype?</b>	Yes. I find that Facetime or Skype works very well.
<b>Research Interests</b>	Women and power. Life phase I call "starting older"—the 65-year-old who has 20 years of productivity ahead but needs or wants to make a major change.