

FINANCIAL NEEDS FOR A DENTIST



Whether you are just getting started in your career, preparing to retire, or anywhere in between; having a financial advisor that specializes in working with Dentists is an important resource. I am happy to talk with you or be a second opinion, to confirm you are on pace to pursue your future goals and help address any potential holes in your current financial plan. Some of the items that I can assist you with include:

Practice Owner:

- Establishing a workplace retirement plan to potentially lower taxes and benefit employees
- Business overhead expense and business loan protection, Disability Insurance
- Buy-sell agreements for both life and disability insurance, if you are a partner
- Tax strategies for office expenses and future growth of the practice
- Setting up group discounts for insurance policies to save money

Associate:

- Strategies to save for a future practice purchase or start-up opportunities
- Strategies to pay down debts
- Personal financial planning needs regarding investments, life insurance, and disability insurance

Personal Needs:

- Planning for a new home
- Saving for retirement needs
- Paying off student loans and other debt
- Disability insurance to help protect your income
- Life insurance to help protect your family and pay off debts
- Estate planning needs to help protect your family
- Saving for college and other educational expenses

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