

FINANCIAL TIMELINE FOR DENTISTS

Codrea Financial Services



As you reach the end of dental school through your first year as a dental professional:

RESIDENT or SPECIALIST *start focusing on:*

- Loan payment plan
- Establishing an emergency fund
- Contributing to a retirement account
- Purchasing disability and malpractice insurance

ASSOCIATE *continue to work on:*

- Loan payoff/ consider refinancing student loans
- Building an emergency fund
- Contributing to a retirement account
- Strategize saving for future practice

MILITARY *key areas of focus:*

- Figure out loan payment program if applicable
- Start an emergency fund
- Begin saving for midterm goals in a conservative to moderate account to purchase a home or practice after your service
- Begin contributions to a retirement account
- Prepare for disability and malpractice insurance once you finish service

OTHER ISSUES *if married, have children or own a home:*

- Life Insurance
- Setting up a will or trust
- College funding accounts
- Spouse's retirement options
- Additional debt payment plans

HOW JASON CAN HELP *services available:*

- Complimentary buy-sell review
- Life/Disability/Long term care insurance
- Retirement plans
- College planning
- Comprehensive financial planning

www.codreafinancialservices.com 614-452-8185