



Physicians Financial Bootcamp

Help Improve Your Financial Stability

Winnebago County Medical Society and University of Illinois College of Medicine-Rockford are co-sponsoring an educational financial literacy program for physicians.

Financial Advisors, **Brian Knabe MD, CFP®, CMP®** and **Allison Alexander CFP®, CPA, CDFA®** of Savant Wealth Management will share which financial areas physicians should prioritize at each stage of his/her career.

Sessions will be held at the UICOM-Rockford campus.
1601 Parkview Ave. Rockford 61107

-  **September 21, 2022**
5:30-6:30pm
Starting Out/Beginning of Career
(med students and residents)
 - Budgets & Lifestyle
 - > Comparison of steady savers with late savers
 - Debt vs. income
 - Emergency funds
 - Best ways to save and how much to save
 - Is there a need for more insurance—life and disability
 - Debt repayment
-  **November 16, 2022**
6:30-7:30pm
Late Career and Transitioning into Retirement
(60+ yo's)
 - Are you ready? Projections
 - Consider working part time/volunteering
 - Proactive tax planning & Roth conversions
 - Federal and state estate tax planning
 - Estate plans
 - Legacy and helping next generations
-  **October 12, 2022**
6:30-7:30pm
What to Consider Mid-career
(30/40/50 yo's)
 - Saving for children's education
 - Is there a need for more insurance—life and disability
 - Estate plans
 - Best ways to save and how much to save
-  **January 18, 2023**
5:30-6:30pm
How to Pivot when Unusual things Happen
(everyone)
 - Changing/losing jobs/med mal tail coverage
 - Evaluating job offers
 - Serious illness
 - Marriage or divorce
 - New baby
 - Losing a loved one

Savant Wealth Management ("Savant") is an SEC registered investment adviser headquartered in Rockford, Illinois. Past performance may not be indicative of future results. Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy, including the investments and/or investment strategies recommended and/or undertaken by Savant, or any non-investment related services, will be profitable, equal any historical performance levels, be suitable for your portfolio or individual situation, or prove successful. Savant is neither a law firm, nor a certified public accounting firm, and no portion of its services should be construed as legal or accounting advice. You should not assume that any discussion or information contained in this document serves as the receipt of, or as a substitute for, personalized investment advice from Savant. A copy of our current written disclosure brochure discussing our advisory services and fees is available upon request or at www.savantwealth.com. The scope of the services to be provided depends upon the needs of the client and the terms of the engagement. Certified Financial Planner Board of Standards Inc. (CFP Board) owns the certification marks CFP® and CERTIFIED FINANCIAL PLANNER™ in the U.S., which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

866.489.0500 | savantwealth.com

INVESTMENTS | FINANCIAL PLANNING | TAX | PRIVATE TRUST | RETIREMENT PLANS

SAVANT



WEALTH
MANAGEMENT
EST 1986