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

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

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

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

866.489.0500 | savantwealth.com

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

SAVANT WEALTH MANAGEMENT
EST 1986