

FINANCIAL FUNDAMENTALS

Build a solid foundation, consistently review and update

RESIDENT

- Disability Income Insurance
 - Professional Liability *
 - Life Insurance
 - Auto/Renters/Homeowners
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* if Moonlighting

ASSOCIATE, DSO, MSO INDEPENDENT CONTRACTOR

- Disability Income Insurance
- Professional Liability
- Life Insurance
- Auto/Renters/Homeowners
- Personal Umbrella

ACADEMIC

- Disability Income Insurance
 - Professional Liability *
 - Life Insurance
 - Auto/Renters/Homeowners
 - Personal Umbrella
 - Long Term Care
-
* if Moonlighting

INDIVIDUAL PRACTICE OWNER

- Disability Income Insurance
- Professional Liability
- Life Insurance
- Business Loan Protection
- Business Overhead Expense
- Life Insurance for Practice Loan
- Business Owner's Policy
- Cyber Security
- Employment Practices Liability
- Workers Compensation
- ERISA Bond
- Employee Benefits
- Auto/Renters/Homeowners
- Personal Umbrella
- Long Term Care

PARTNER PRACTICE OWNER

- Disability Income Insurance
- Professional Liability
- Life Insurance
- Business Loan Protection
- Business Overhead Expense
- Life Insurance for Practice Loan
- Disability/Life Buy-Sell
- Business Owner's Policy
- Cyber Security
- Employment Practices Liability
- Workers Compensation
- Entity Coverage
- ERISA Bond
- Employee Benefits
- Auto/Renters/Homeowners
- Personal Umbrella
- Long Term Care



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Additionally consider:

- Emergency Fund
- Student Debt Management
- Check Credit Score
- Financial & Retirement Planning
- Investment Management
- Alternative Investments
- Tax Planning
- Estate Planning
- Philanthropy

PLEASE VISIT:

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