

Our Specialized Retirement Wealth Program for Physicians



After many years of working with medical doctors and other healthcare professionals, we've built a comprehensive retirement program around our intricate understanding of the financial considerations and opportunities they often face.

› Financial Analysis

Our team carefully evaluates your existing financial structures, including your investment portfolio, and explores options for practice incorporation, compensation models, protection strategies and tax efficiency.

› Comprehensive Retirement Plan

With a focus on defining your lifestyle today and into retirement, we create a living plan for building, managing and transitioning your wealth through the coming years. This includes cash flow planning, retirement income planning, wealth preservation and lifestyle maintenance.

› Personalized Investment Strategy

We construct a diversified portfolio that is designed to meet your specific needs, withstand market fluctuations and support the goals and strategies outlined in your comprehensive retirement plan.

› Private Banking for Physicians

Our physician clients gain access to preferred pricing and exclusive rates on borrowing, credit cards, mortgages and investments. This specialized banking program provides flexible, convenient service for busy healthcare professionals.

› Practice Transition Planning

We guide you through the process of exiting your practice, considering priorities like succession and tax-efficient capital extraction. We coordinate and adapt your comprehensive plan as you progress into a fulfilling retirement, managing the timing of your retirement income from registered accounts and working with our specialist network to ensure a smooth transition.

› Estate Plan

Our estate planning specialists work closely with you to establish continuity between generations, ensuring your legacy is preserved. While developing appropriate financial structures, we also assist with goal setting, communication, and education of younger family members.

If you are interested in learning more about our offering, you can explore our website or give us a call directly at the number below. We hope to hear from you soon.



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