I told my dentist my teeth are going yellow. He told me to wear a brown tie. - Rodney Dangerfield

Special Services for the Dental Community

Just like good oral hygiene is important and requires a daily routine, so is your personal financial health, and like any other health care professional, dentists are the busiest they've ever been. While you're taking care of your patients, who is taking care of your financial well-being?

Do you have the time to check on whether your assets are in the most productive place?

Is your retirement plan effective?

Are your trust and estate plan strategies current?

Through a collaborative relationship and our extensive knowledge of the financial challenges faced by dentists, we can help you assess your dreams and aspirations, and identify and prioritize your short and long-term goals. Then, we'll provide you with the necessary information you need to make important decisions and address the most intricate financial concerns. All specifically tailored to meet your unique, personal needs.

During this process you will have access to leading investment and insurance companies' products, and the information you need to make informed decisions about:

-Individual Risk Management

We offer a variety of strategies that use products and services that may include life insurance, annuities, disability income and long-term care insurance, health insurance and business planning.

-Financial Strategies

We can help you create a financial strategy that looks at your total financial picture and gives you a comprehensive, recommended road map for organizing and addressing your major financial objectives, whether it be saving for retirement, education funding, addressing your investment goals or leaving a legacy for your heirs.

-Investments and Retirement Funding
We give you access to the investment management experience of many of the country’s top money managers. This breadth of product and service offering enables you to pursue a broad spectrum of investment objectives.

-Estate Conservation and Wealth Preservation
We work with your attorney and/or tax advisor to help design an effective estate plan incorporating your financial objectives. We offer strategies to help you conserve your assets and protect your estate from some of the federal and state tax obligations.

-Business Planning
Dentists are subject to rapid changes in their insurance and regulatory environment. In addition, dentists who run their own practices need to contemplate an exit strategy (or may want to buy/merge with other practices) all while juggling patient care, benefit plans for their employees, and business taxation issues, to name just a few. We can help you identify the most cost-effective and efficient business structure and benefit programs.

Our commitment to you is demonstrated by our dedication to our clients, our community and our profession. Because you have a lifetime of financial goals and objectives, we concentrate on building long-term relationships, and, as time goes by, you can count on us to be there to help ensure you stay on track toward meeting your objectives.

We invite you to call our office to set up an appointment to see how we might be of service to you.