Financial Planning for Residents and New Physicians

Presented by:
Finity Group, LLC Medical Division
Speaker: Cole Kimball, AIF

November 16, 2016 6:30pm - 8:00pm

Primary Seminar Focus:
- Prioritizing your financial needs
- The three methods of diversifying a financial plan

Learning Objectives:
- Differentiate good debt vs. bad debt, and learn how to calculate the cost of borrowing on a debt
- Identify types of risks you should insure with an insurance policy versus the risks you should self-insure
- Determine how to match your investments to your time horizons
- Identify the differences between pre-tax and post-tax retirement plans

About the Speaker: Cole Kimball is a Financial Advisor and Chief Investment Officer with Finity Group, LLC, an independent financial planning firm based in Portland, OR. He has developed a national financial planning practice specializing in helping physicians and other medical professionals reach their goals and achieve financial independence. In 2014 and 2015, he was recognized as one the “Best Financial Advisors for Doctors” by Medical Economics Magazine. When working with medical professionals, he strives to build long-term relationships with clients based on the core values of trust, integrity and service. His goal is to educate clients about the importance and aspects of financial planning so they can feel secure and make sound financial decisions.

Where:
Medical Society of Metropolitan Portland
1st Floor - Conference Room A
4380 SW Macadam Ave
Portland, OR 97239

Fee:
Free to MSMP Members
*Spouses Welcome
Dinner will be provided

Register:
www.MSMP.org
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*The information presented in this seminar should not be considered tax advice. You should consult your tax advisor regarding your own situation. Registered Representative, Securities offered through Cambridge Investment Research, Inc., a Broker/Dealer, Member FINRA/SIPC. Investment Advisor Representative, Cambridge Investment Research Advisors, Inc., a Registered Investment Advisor. Finity Group, LLC and Cambridge are not affiliated. Recipients of The Best Financial Advisors for Doctors were chosen based on their knowledge and experience, items taken into consideration were their certifications, specializing in the physician or medical field and a minimum of 10 years experience. The advisor must represent a broad geographical range for their services, charge either a fee or commission for their services, require a portfolio to have a $1 million or less as a minimum and be in good standing, not found guilty of any wrongdoing on a national level, with the Securities and Exchange Commission and Financial Industry Regulatory Authority. This recognition is not representative of investment performance or returns.