

Financial Planning For Anesthesiologists Syllabus

The Participants in this seminar will gain an understanding of the important components of a wealth management process through exercises and case studies that are designed to give them the tools needed to begin or refine their own financial planning process.

Participants will be provided with a copy of the Wealth Management Edge and a Case Study that's relevant to their career stage.

1. Contentment Net Exercise (10 min)
 - a. The participants will be guided through this exercise to help them gain perspective on the planning process
2. Wealth Map Exercise (10min)
 - a. The participants will be introduced to the concept of a wealth map and guided through the construction of a basic map for their situation
3. Introduce the Wealth Management Formula (5min)
4. Components of Wealth Management (40min)
 - a. Investment Consulting
 - b. Wealth Protection
 - c. Wealth Preservation
 - d. Wealth Transfer
 - e. Charitable Giving
5. Break (10 min)
6. Break Out Sessions: The breakout sessions will review a specific anonymous case and use it to help the participants gain an understanding of the important planning considerations for their career state. (30 min)
 - a. Early to Mid Career Anesthesiologist
 - b. Later Career Anesthesiologist
7. General Q&A (15 min)