



## COMPREHENSIVE FINANCIAL STRATEGIES FOR SOLID FUTURES.

Financial Designs helps medical professionals build solid financial futures. For more than 40 years, we've assisted medical professionals by creating customized, comprehensive financial strategies. We know which insurance plans you need and how to maximize your investments. We're prepared to take care of all your tax needs, and we'll help you decide which steps to take to protect your money. We focus on tomorrow, so you can focus on today.

Our insurance, investment, tax and asset protection teams work in tandem to help you chart a path to living life on your terms, so you can focus on what's important to you. You can take advantage of all our services, or just the ones you need right now. We'll take care of the details.



### Insurance Services

Maintain your health. Preserve your income.  
Protect your family's future.

- Health
- Disability
- Life
- Long-term care



### Tax and Accounting Services

Minimize your tax burden. Stay on top of payroll. Get advice year-round.

- Tax planning
- Tax preparation
- Accounting and payroll



### Investment Services

Save your money. Eliminate debt.  
Set up your ideal retirement.

- Retirement plan design
- Education planning
- Budgeting
- Retirement income distribution



### Asset Protection Strategies

Shield yourself from lawsuits. Lower your financial profile. Distribute your wealth on your terms.

- Entity creation
- Estate planning
- Advanced asset protection planning



### Client Portal

Monitor your money. Organize finances online. Access from anywhere.

Manage all your finances in one secure location with your own personal financial website. Save and access every bank, credit and investment account, whether they're linked to us or not. See your bottom line, updated in real time, anytime – from your computer or through our mobile app. You can also use our portal as an online safety deposit box. With unlimited storage, you can secure digital valuables such as insurance policies and estate planning documents.

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