

TIER II:

YEARS 5-15

(WEALTH ACCUMULATION)



HOW WE
CAN HELP

- Ownership, partnership, remaining a 1099, purchasing a practice, or building a practice.
- Buy-in loans
- Tax deductions from your overhead costs
- Doctors should consider having the following:
 - ✓ CPAs, attorneys, fiduciary advisor to assist in establishing and managing tax, legal, and various other liabilities.
 - Buy/Sell agreements
 - Disability Business Overhead Expense policies
 - Retirement plans and employee benefits packages
 - Business Interruption insurance
 - Personal and Business liability insurance
 - Establishment of various LLCs, corporations, etc. to protect assets against liability, and manage taxes.
 - Emergency groups in the event of disability or pre-mature death.
 - The value of your practice is directly correlated to your business to continue to run should something happen.
 - ✓ Personal planning:
 - Schedule vacations and time for yourself and family.
 - Will/Trusts
 - Life insurance to protect families or positioning tax beneficial and liquid assets for emergencies, opportunities, and legacy planning.
 - Consider maximizing disability coverage within the first 5-10 years of practicing.
 - Manage debts based on interest rates, terms, and net cost if the debts are tax favorable.
 - Strategic allocation of cash flows and savings towards investment opportunities.

Chris Nunn is a registered representative of and offers securities and investment advisory services through MML Investors Services, LLC. Member SIPC
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Chris Nunn does not provide tax or legal advice.
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