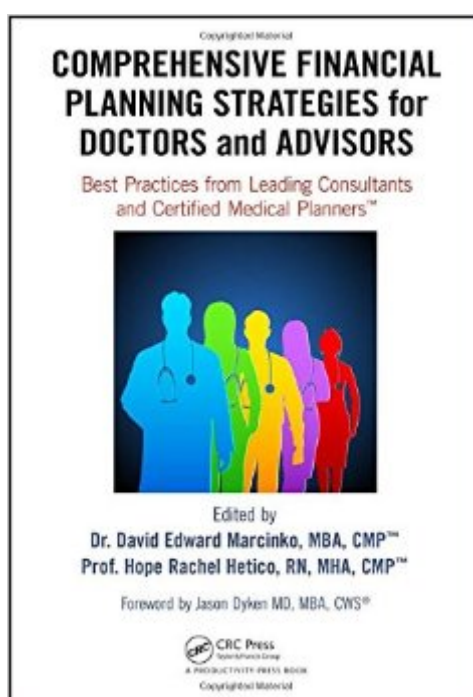


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# Comprehensive Financial Planning Strategies For Doctors And Advisors: Best Practices From Leading Consultants And Certified Medical Planners™



## Synopsis

Drawing on the expertise of multi-degreed doctors, and multi-certified financial advisors, *Comprehensive Financial Planning Strategies for Doctors and Advisors: Best Practices from Leading Consultants and Certified Medical Planners* will shape the industry landscape for the next generation as the current ecosystem strives to keep pace. Traditional generic products and sales-driven advice will yield to a new breed of deeply informed financial advisor or Certified Medical Planner. The profession is set to be transformed by "cognitive-disruptors" that will significantly impact the \$2.8 trillion healthcare marketplace for those financial consultants serving this challenging sector. There will be winners and losers. The text, which contains 24 chapters and champions healthcare providers while informing financial advisors, is divided into four sections: glossary of terms, CMP curriculum content, and related information sources. For ALL medical providers and financial industry practitioners For NEW medical providers and financial industry practitioners For MID-CAREER medical providers and financial industry practitioners For MATURE medical providers and financial industry practitioners Using an engaging style, the book is filled with authoritative guidance and healthcare-centered discussions, providing the tools and techniques to create a personalized financial plan using professional advice. Comprehensive coverage includes topics like behavioral finance, modern portfolio theory, the capital asset pricing model, and arbitrage pricing theory; as well as insider insights on commercial real estate; high frequency trading platforms and robo-advisors; the Patriot and Sarbanes-Oxley Acts; hospital endowment fund management, ethical wills, giving, and legacy planning; and divorce and other special situations. The result is a codified "must-have" book, for all health industry participants, and those seeking advice from the growing cadre of financial consultants and Certified Medical Planners who seek to "do well by doing good," dispensing granular physician-centric financial advice: *Omnia pro medicus-clientis*. RAISING THE BAR The informed voice of a new generation of fiduciary advisors for healthcare

## Book Information

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## Customer Reviews

I'm an investment manager with many clients in medical profession. This book is certainly "Comprehensive". Physicians are inundated with self serving sales pitches for Wall Street & Insurance Industry products. Most don't have the detailed knowledge with which to identify "conflicts of interest" & find the highest level fiduciary who is only working in their best interest (no back door payments from the investment products). I'm going to be sharing this book with any new client from the medical profession...I'll be starting them on the investment chapters (Ch 11, Ch 12, Ch 13).Bravo!

This comprehensive textbook provides an in-depth presentation on the financial planning process and issues facing all modern medical professionals today [early, mid-life and mature practitioners]. It is far beyond the mere Investing and retirement concerns I faced when originally entering practice three decades ago. In fact, the word "comprehensive"™ is an understatement for this well research, cited and wonderfully insightful modern treatise.DR. BARBARA S. SCHLEFMAN;  
MS[Tucker, GA]

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