A Veterinarian's Financial well-being is...

...both business and personal

VETERINARIANS:

As a veterinarian, you truly are both a small business owner and also someone who needs to be concerned about personal finances. Based on our experience, your employees probably have "5" financial concerns. You may have "5" too, but yours are different. Unfortunately the two do not always overlap.

In order to satisfy the needs/wants of the employees a veterinarian will often design benefits around the employee. The net result is that they may not meet your personal financial objectives. There are opportunities for the business to incorporate strategies which are more aligned with your needs/wants as the owner(s) of the business.

My focus with veterinarians is to pursue financial strategies which are designed to meet your needs. We do this by looking at the business as one financial entity and you, personally, as another. We then explore ways the business can be leveraged to benefit you personally.   The two must be viewed independently but also complementing one another.

This requires an understanding of typical programs offered in business – experience in the use of selective benefits which can be incorporated to assist the veterinarian in business and personal financial planning.

To explore how you might benefit, I utilize a short questionnaire which covers "5" key topics. This will give us both a feel for how you are doing and create a good place to start a dialogue.

THE FIVE TOPICS ARE:

1) Recruit, Retain and Reward talent
2) Business Succession & Continuation Planning
3) Income Continuation
4) Risk Management
5) Estate Planning

Each of these five primary topics include a variety of sub topics, which go beyond the scope of this piece.

If you are interested in visiting, let me know. It would be a pleasure to spend some time with you.