Financial Planning Fundamentals: From Debt to Retirement and Beyond

For many, the ultimate financial goals are to make work optional and pass a legacy to our heirs.

The first step is to learn how to manage debt, protect our assets through appropriate insurance (professional and individual), maintain liquidity and guard against identity theft. The second step is to generate surplus income that can be invested for future uses. Finally, we need to grow our assets to last a lifetime and beyond.

Accomplishing these goals require knowledge, discipline and proper financial planning. This course discusses the basic fundamentals of asset protection, debt management, wealth creation and asset management techniques.

While ideal for those just starting their financial journey, seasoned investors can also benefit from this fundamental review.

Dr. Pat Little is one of the best speakers I have encountered. He lectures with information gleaned from first-hand experience as a private practice dentist, accountant and fraud examiner. His information is tangible to every dental practice owner.

Dr. Mike Munn
Grand Strand Dental Society

COURSE OBJECTIVES

- Understand debt management, credit score fundamentals and identity theft avoidance
- Utilize proper insurance management for individual and professional protection
- Explore options for college, retirement and succession planning
- Learn the differences between actively and passively managed portfolios including fees
- Discover why asset allocation and rebalancing is important for long-term financial success

Suggested Format:

Half-day, Full-day, After-dinner, Keynote

Audience: Ideal for the entire dental team

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