

financial planning for healthcare professionals

Contacts

Ginny Stanley 505.998.3216
gstanley@redwstanley.com

Scott Pelfrey 505.998.3232
spelfrey@redwstanley.com

DO YOUR PROFESSIONALS KNOW WHERE THEY'RE GOING FINANCIALLY?

When employees understand and control their financial lives, they perform better. Most professionals are too busy to assess their circumstances and develop and implement a financial plan that fits their situation. They should consider:

- What are their financial goals, and are they realistic?
- What is their present situation?
- Are their recent spending and savings habits such that they can achieve their financial goals?
- Does their investment program align with their goals, and how much is it really costing them?
- Do they have adequate insurance to manage risk?
- Are they taking advantage of the employee benefits you offer?

HOW WE CAN HELP

Our educational and consultative approach to strategic financial planning centers on their individual goals and needs within the context of their employment with you. The result is professional employees who come to work every day with the peace of mind that comes with knowing they have a handle on their finances.

WHY CHOOSE REDW STANLEY?

We are experienced in working with healthcare professionals. Our staff includes CPAs, Personal Financial Specialists, Certified Financial Planners and Chartered Financial Analysts, several of whom have spent decades advising healthcare professionals on business, tax, and wealth management matters.

We can help you develop educational or advisory programs to assist your professionals with their financial affairs. We don't sell products or take commissions. We are "fee only," meaning the only revenue received is that from the client. We do not earn or accept any commissions, rebates, 12(b)1 fees (unless rebated back to the plan), referral fees, or other remuneration direct or indirect based upon our recommendations. We accept no product provider incentives. You can be confident our recommendations are based entirely on your needs and that we will advise you with only your success in mind.