GOLD MEDAL SERVICES

THE STANDARD IN PHYSICIAN WEALTH MANAGEMENT

INVESTMENT OVERSIGHT SERVICE

- Reviewing your investments and designing a personalized portfolio appropriate to your needs
- Year-long, continual monitoring of your investments
- Quarterly, semi-annual or annual meetings to review and evaluate your investment performance and portfolio rebalancing
- Recommendations regarding positioning of investments within your employer provided retirement plans such as 401(k)s, 403(b)s, 457(b)s, etc.

TAX REDUCTION PLANNING

- Comprehensive review of your tax return to maximize tax reduction strategies
- Review how new tax laws may affect your personal situation
- Provide tax-loss harvesting and tax-aware investing options
- Coordinate tax-advantaged charitable contributions
- Design tax-minimized retirement income to maintain your desired retirement lifestyle

RETIREMENT PLANNING

- Build a personalized retirement plan, including analysis of future income needs
- Coordinate prudent distribution strategies for your retirement plan and IRA funds
- Analysis of the beneficiaries of your IRAs and how to establish an Inherited IRA
- Review effective transition strategies into and through retirement

FAMILY WEALTH PLANNING

- Analyze your estate plan's efficacy by considering your desires and tax consequences
- Assist in transferring assets to your heirs, trusts, charities, or other parties
- Identify legal documents necessary to authorize and direct your affairs due to incapacity or death
- Providing guidance with the appropriate and necessary steps after the death of a loved one

ADDITIONAL SERVICES

- Debt payoff planning (including student and practice loans)
- College education savings planning
- Employment contract review for compensation negotiation strategies
- Insurance planning including life, disability, property & casualty, and long-term care

These services are semi-annually reviewed by a board of IMA appointed physicians to ensure they are in your best interest. If you are not currently receiving this level of service, please call IMA Financial Services at 208-336-9066 and schedule your initial NO-COST financial consultation today!

IMA FINANCIAL SERVICES

Experience. Trust. Fiduciary.

The three qualities you need in a financial professional in times of uncertainty.

IMA Financial Services is here to help those who fight for the health of our communities.

Call today to discuss the strategies we are implementing for your financial health!

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WWW.IMAFS.ORG 208-336-9066