CLEARSTONE
WEALTH MANAGEMENT

Medical Practitioners

Today, the dramatic changes taking place in the medical profession are creating an uncertain future for physicians and practitioners. Perhaps more than ever, it is necessary for practitioners to review their finances, careers and opportunities.

Our planning includes assessing job opportunities, tax planning for independent contractor income, business entity selection, and – where appropriate – Solo 401(k) design and implementation. We analyze student loan options including loan forgiveness and refinancing, to find the best solutions for you. When you are ready to purchase your first home, we help find favorable mortgages and terms available to your profession. And as your practice grows, we help navigate the complexities of insurance, retirement options and how to effectively transition out of medicine.