

partner wealth

Welcome to Iowa City! My wife Maria and I are not a physician family, but we know the life stage you are most likely in. We moved to Iowa City in 2013 and had just completed the adoption process for our two daughters. Between adoption, moving to a completely new location and starting a business we had a lot to learn. It was a little crazy (to say the least)! Finding good community was important to us and I'm guessing it is just as important to you. You are off to a good start by joining IMP!

As a physician family, it's also important to surround yourself with knowledgeable, trustworthy friends and advisors who always consider your best interests.

I've worked as a financial advisor, and specifically with physicians and their families since 2015. In my experience working with residents and fellows, I know the many financial challenges and questions you will be faced with as you transition into residency, fellowship and eventually out into practice. Don't wait until you have an attending-physician income to start developing healthy financial habits!

There are a lot of things to prioritize while your family is still in training and while you are young and healthy. As a member of IMP, you have unique access to reach out anytime with your financial questions. I hope to be a trusted resource for your family.



FINANCIAL PLANNING

CASH FLOW & BUDGETING

DEBT MANAGEMENT STRATEGIES (HIGH INTEREST, STUDENT LOAN & LOAN FORGIVENESS)

RISK MANAGEMENT STRATEGIES (LIFE INSURANCE & PHYSICIAN-INCOME PROTECTION INSURANCE)

INVESTMENT MANAGEMENT STRATEGIES

ESTATE PLANNING CONSIDERATIONS

- **BOBBY SCOTT** | CFP®