No-Fee Personalized Financial Guidance for Residents & Fellows

Financial Guidance Without the Cost or Commitment

Residency and fellowship are some of the most demanding years of your life—both professionally and financially. With long hours, limited income, and student loans looming, getting financial advice can feel out of reach. But the decisions you make now will shape your financial future, and we believe guidance shouldn't be a luxury during training.

That's why we offer **no-cost, no-commitment financial guidance** for residents and fellows.

We know resources are tight, and adding another expense to your budget may not feel justifiable. But **financial education shouldn't wait until you're an attending**—building strong financial habits now can set the stage for success later. Whether you have questions about **student loans, investing, workplace benefits, or just where to start**, we're here to help.

How It Works

- **No-Fee Consultations** – A no-cost way to get financial guidance during training.
- **Ask Anything** – Student loans, budgeting, investing, benefits—whatever's on your mind.
- **Personalized to You** – Guidance based on your situation, not a one-size-fits-all approach.
- **Available on Your Schedule** – Virtual meetings with availability after hours and on weekends by appointment.
- **Observation & Action Summary** – A recap of key takeaways and recommendations so you have a clear path forward.


Observation and Action Summary

Name ______ Date ______

Specialty ______ Program ______

Current Info	Action Items

Cash Flow Summary
Retirement and Savings Goals Summary
Disability Summary
Student Loan Summary
Benefits Summary and Other

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There's **no expectation and no pressure**—just clear, useful financial guidance so you can feel more confident about your future. And when you transition to attending life, we hope you continue to think of us as a trusted resource.

Start asking the questions that will set you up for success.

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Schedule Your Zero Meeting

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