

You Are Cordially Invited To Our Upcoming:

**Financial Planning Dinner Seminar
For New Physicians**

- Speaker:** Cole Kimball, AIF®
- Host:** Finity Group, LLC
- Date:** Wednesday, February 28, 2018
- Time:** 7:30pm – 9:00pm (*Dinner Provided*)
- Location:** **Tobacco Road Sports Café**
280 S Mangum St #100
Durham, NC 27701
- Cost:** No cost or obligation (Spouses welcome too!)
- RSVP:** Email Carlie.Ransom@thefinitygroup.com
or, Call (720) 709-4736 – Space is limited
Visit www.thefinitygroup.com to learn more



Primary Seminar Focus:

- Prioritizing your financial needs
- The three methods of diversifying a financial plan

Learning Objectives:

- Differentiate good debt vs. bad debt and learn how to calculate the cost of borrowing on a debt
- Identify types of risks you should insure with an insurance policy vs. the risks you should self-insure
- Determine how to match your investments to your time horizons
- Identify the differences between pre-tax and post-tax retirement plans

About the Speaker: Cole Kimball is a member of Finity Group's Medical Division in Portland, OR and Seattle, WA. He has developed a national financial planning practice specializing in helping physicians and other medical professionals reach their goals and achieve financial independence. In 2014, he was recognized as one of the "Best Financial Advisors for Doctors" by Medical Economics Magazine. When working with medical professionals, he strives to build long-term relationships with clients, based on the core values of trust, integrity, and service. His goal is to educate clients about the importance and aspects of financial planning, so they can feel secure and make sound financial decisions.

**The information presented in this seminar should not be considered tax advice. You should consult your tax advisor regarding your own situation. Registered Representative, Securities offered through Cambridge Investment Research, Inc., a Broker/Dealer, Member FINRA/SIPC. Investment Advisor Representative, Cambridge Investment Research Advisors, Inc., a Registered Investment Advisor. Finity Group, LLC and Cambridge are not affiliated.*

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