

The Road to Financial Success for Doctors

AGILI's Financial Tips for the Stages of a Doctor's Career



Medical School

- Borrow at lowest rate possible
- Explore scholarship and grant opportunities
- Keep living expenses low

Residency

- Keep living expenses low
- Begin to pay off high interest loans, if possible



Early Doctor

- Purchase additional disability and life insurance
- Pay off high interest debt first
- Establish emergency fund
- Pay down lower interest medical school debt while contributing to retirement accounts

Wealth-Building Years

- Save 15–20% of income
- Employer tax-deferred retirement accounts
- HSAs
- Backdoor Roth IRAs
- Taxable brokerage accounts
- Alternative investments
- Cash balance plans
- College savings 529s



Get in Touch

We offer financial planning, investment planning and fulfillment-focused services to enable you to live your life more fully. We handle the details for you.