WEALTHCARE FINANCIALS

Checking In — A Quick Note from Wealthcare Financials

Just Thinking About You

No agenda here — just a quick note to say it's always good to have you in our corner of the world.

As you move through a demanding career in medicine or dentistry, a lot can shift quietly in the background: practice structures change, income grows, family situations evolve. What made sense for your financial picture two or three years ago may deserve a fresh look — not because anything is wrong, but simply because life moves forward.

One area worth keeping in mind as circumstances change is income protection. The Social Security Administration estimates that roughly 1 in 4 working people will experience a disability before retirement — a sobering reminder that a career in healthcare isn't immune to unexpected interruption, no matter how careful or skilled the professional.

If anything in your situation has shifted — a new partnership, a move, a growing family — I'm always happy to have a low-key conversation just to make sure things still line up the way you'd want them to.

No pressure, no pitch. Just here when it's useful.

Warm regards, Kris Schwartz Wealthcare Financials | An agency of The Guardian Life Insurance Company of America

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