

Comprehensive tax and advisory services for locum and 1099 healthcare professionals — now under one roof.

When financial services are divided, it often leads to missed planning and tax saving opportunities — especially for independent 1099 physicians managing variable income and multi-state work.

You've earned it.



Solutions for doctors and their practices

FOR YOU

 Wealth Management

 Tax Planning & Prep

FOR YOUR PRACTICE

 Payroll

 Accounting

 Retirement Plans

 Tax Planning & Prep

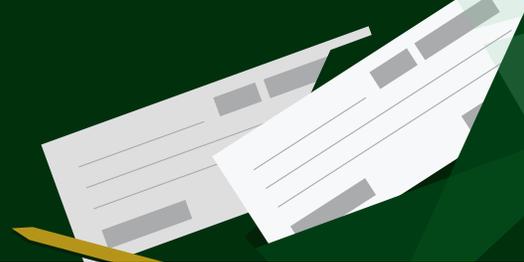
Access superior investment strategies:

- Custom Indexing & Tax-Efficient ETF Portfolios
- Automated Tax-Loss Harvesting
- Tax-Wise Separately Managed Accounts (SMAs)
- Hand-Picked Private Investments



Our approach is built to **maximize after-tax wealth**, aligning your investment strategy with a comprehensive financial plan tailored to you.

10 Questions to Help Strengthen Your Tax & Wealth Strategy



- 1 As a 1099 professional, are you maximizing Solo 401(k) or Cash Balance contributions based on your variable income?
- 2 Do you have a coordinated plan for Backdoor Roth contributions or Roth conversions this year?
- 3 Is your portfolio structured for tax efficiency and diversification across all your retirement and taxable investment accounts?
- 4 Did you harvest gains or losses strategically this year to reduce taxes?
- 5 As a self-employed 1099 professional, are you optimizing your S-corp strategy, reasonable salary, and family income shifting?
- 6 Are you capturing all eligible 1099 deductions (travel, licensing, CME, housing, and equipment)?
- 7 Do you have a plan for charitable giving that optimizes taxes (DAF, appreciated stock, QCDs)?
- 8 Are you contributing to an HSA, FSA, 529, or other health/education tax-advantaged accounts?
- 9 Have you encountered any life-changing events this year that may impact your short-term and long-term financial objectives?
- 10 Do you have a coordinated plan that integrates tax planning, investing, insurance needs, estate planning, and budgeting needs?

Schedule
your free
consult!



Uncover potential opportunities today

Book your **complimentary tax & wealth consult** for
1099 physicians.

Learn more at [earned.com](https://www.earned.com)