

Stribling~Whalen Financial Group

RAYMOND JAMES®

Financial Peace. Everyone strives for it.

When you envision retirement:

- Are you confident or concerned?
- How much money will you need?
- At what age would you like to stop working?

AMA Insurance surveyed over 1,200 retired physicians as to how they felt about retirement:

- 43% are very satisfied with their retirement (516 out of 1,202)
- 37% are satisfied with their retirement (444 out of 1,202)

What made those 960 physicians satisfied with their retirement? Five factors can be identified with individuals who are “very satisfied” as opposed to those less satisfied:

1) Age at Retirement

- 2 out of 3 retired in their 60s.

2) Financial Status

- 92% identified themselves as either “Ahead of Schedule” (14%) or “On Track” (78%).

3) Financial Understanding

- 4 out of 5 claim themselves to be very knowledgeable about personal finance.

4) When they Started Saving

- 85% began saving at the latest a couple years into their career as a physician.

5) Use a Financial Planner

- 7 out of 10 use a financial advisor.

We can assist you with these factors. As well as:

- Can you retire at 62, 65 or 70?
- Do you want to?
- How will that decision affect your financial plan?

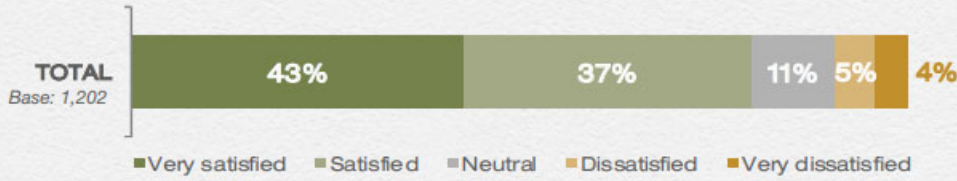
By having meaningful conversations, Stribling~Whalen Financial Group can help determine what financial peace means to you, identify financial goals you have, and create a plan to help you achieve both. Call us at 678-989-0048, or visit our website at www.striblingwhalen.com to begin your journey to financial peace.

View this video to learn more about our process:

<https://www.raymondjames.com/striblingwhalen/resources/2017/12/25/visualize-your-future-video>

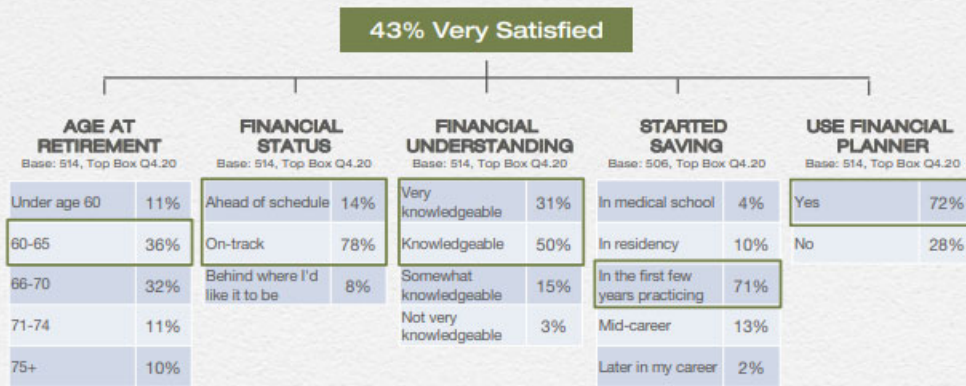
Satisfaction with Retirement

Overall, most retired physicians (**80 percent**) say they are satisfied or very satisfied with their retirement.



5 Factors That Impact Satisfaction in Retirement

Not all retired physicians are equally satisfied with the retirement stage of their profession. Among those physicians who are very satisfied with their retirement, we identified 5 factors that differ from those who are less satisfied.



AMA INSURANCE | 10 | 2016 Report on U.S. Physicians' Financial Preparedness®

Introduction/
Methodology

Respondent
Profile

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Retirement

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