INVESTRA

Private Wealth for Medical Leaders

Why senior physicians, specialists and healthcare executives are increasingly choosing coordinated wealth management

Built for complexity — without adding complexity.

High earning medical professionals often face a financial life that is more complex than income alone suggests: employer plans, deferred compensation, taxes, insurance, estate decisions, investments and family priorities all compete for attention. The value of the right advisory relationship is bringing those decisions into one coordinated plan.

Why medical wealth is different

Compensation is layered. 403(b), 401(k), 457(b), deferred compensation and other benefits can create separate tax, liquidity and risk decisions.

Tax decisions matter more. Higher marginal rates make the timing of retirement contributions, charitable gifts, investment gains and income especially consequential.

Careers change the plan. Leadership moves, relocation, reduced clinical schedules or retirement can change benefits, cash flow and portfolio needs at the same time.

Time is scarce. A financial “quarterback” can organize decisions and coordinate with CPAs, attorneys and other specialists.

Why InVestra can be a strong fit

Holistic by design. InVestra describes a goals-based approach spanning investments, retirement, risk management, tax planning and estate planning.

One process, not disconnected accounts. Discovery, strategy, implementation and ongoing monitoring create a repeatable framework as life changes.

Coordination with specialists. Complex households benefit when investment, tax, legal and estate decisions are considered together.

High-touch + broader resources. Personal planning can be paired with broader research, market intelligence and investment capabilities through InVestra’s platform relationships.

Why medical professionals are choosing this model

ONE COORDINATED VIEW
Less fragmentation across accounts, benefits, taxes, estate planning and investments.

MORE THAN INVESTMENTS
For high earners, planning decisions can be just as important as portfolio selection.

TIME + ACCOUNTABILITY
A proactive process creates clearer next steps and fewer financial issues competing for attention.

A growing healthcare community at InVestra InVestra reports growing adoption among physicians, specialists, administrators and other healthcare professionals associated with Mayo Clinic, St. Vincent’s, Memorial and other regional systems. The common thread is not a single product — it is the desire for a more coordinated financial life.

The next step is not a product decision. It is a conversation about whether your financial structure is keeping pace with your career, income, family and long-term goals.

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