



# Financial Planning Webinar

## For Society of Hospital Medicine

 **COST**  
No Cost or Obligation  
100% Free educational webinar.

 **HOST**  
SHM  
Speaker Cole Kimball, CFA®

 **Register Online**  
Click a time below:  
- November 8th, 2023 at 3:00pm PST  
- November 14th, 2023 at 6:30pm PST

## You Are Cordially Invited To Our Upcoming Webinar

### WHAT YOU'LL LEARN

#### Primary Webinar Focus:

- Prioritizing your financial needs
- The three methods of diversifying a financial plan

#### Learning Objectives:

- Differentiate good debt vs. bad debt and learn how to calculate the cost of borrowing on a debt
- Identify types of risks you should insure with an insurance policy versus the risks you should self-insure
- Determine how to match your investments to your time horizons
- Identify the differences between pre-tax and post-tax retirement plans
- Employer provided benefits review

#### ABOUT SPEAKER:

Cole has a dual role at Finity Group, serving both as the Chief Investment Officer and as a Financial Advisor to his clients. After graduating from the University of Colorado Boulder, he started his career on the institutional side of finance working at different boutique broker dealers in Denver, Colorado. While rewarding, Cole felt his time could be better spent, and he could have a larger impact, working directly with individuals and businesses to help them navigate the complexities of the financial landscape. Cole lends his working knowledge of the equity capital markets to his clients and our advisory team as he leverages his institutional experience and knowledge to provide his clients and fellow advisors with insights into the dynamics of investing.

Cole Kimball, CFA, has also earned the Accredited Investment Fiduciary Designation from the Center for Fiduciary Studies in 2012. The AIF Designation certifies he has specialized knowledge of fiduciary standards of care and their application to the investment management process.

