

Local firm relieves doctors' worries about finances

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Local financial services firm, Lexco Wealth Management Group of NA, LLC recently held an educational seminar for the local doctors of Connecticut from Hartford Hospital, St. Francis, Uconn and Yale on Feb. 3.


The seminar, titled “Learn the Financial Secrets of Successful Medical Professionals” was presented by Brian Beck, President & CFO of WMGNA and Sam Sheiker, CPA & Partner of Whittlesey & Hadley, P.C., based out of West Hartford.

Beck presented information about financial organization, life and disability insurance and moonlighting taxes. His company, WMGNA, has incorporated the use of seminars into their business plan with the goal of educating a select group of guests on various financial oriented topics that directly affect them and their money. These seminars provide networking opportunities for the guests and educational engagement for his current and prospective clients.

Sam Sheiker, CPA, discussed buy/sell agreements, contract negotiation, employment information and the current and projected job market for the doctors. The two speakers answered questions and eased the concerns of the local doctors.

The seminar provided an outstanding learning opportunity for the doctors. Due to the positive response, WMGNA will be hosting another seminar with similar topics next fall. Anyone who would like information should contact Marissa Haynes via email at marissa@myrestylement.com.

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