

HOW CAN WE HELP?



MD Financial
Management
CMA Companies

The Canadian Medical Association

Representing 80,000 members across Canada

- **National advocacy** – a single, unified voice confronting the issues that affect our members and the health and well-being of Canadians
- **Online clinical resources** – *CMAJ*, textbooks, medical journals, databases, point-of-care tools, *Ask a CMA Librarian* service
- **Practice management and physician wellness resources**
- **Professional development and CME opportunities**
- **Financial planning** – objective financial advice and services through MD Financial Management for members and families

MD Financial Management

- Wholly owned subsidiary of the CMA
- Objective financial advice and solutions for physicians and their families
- MD Advisors across Canada who specialize in advising medical students
- Salaried advisors
- Most trusted by Canadian physicians¹



**MD Financial
Management**
CMA Companies

¹ Source: The MD Financial Management Loyalty Survey (June 2014). Respondents (MD clients and non-MD clients) were asked to identify their primary financial institution (MD or Other), and then rate their level of trust associated with that institution. MD received the highest trust rating compared with all other firms rated.

Your Expert Office For Total Wealth Management Strategies

A collaboration of financial advisors and specialists who engineer total wealth management strategies and solutions exclusively for physicians and their families.

- ◆ **Financial Planning**
for you and your family
- ◆ **Investments** to help you
achieve growth and income
- ◆ **Insurance** to help you
protect valuable assets
- ◆ **Estate and Trust** planning
for your security and legacy
- ◆ **Banking and Borrowing**¹
access for your day-to-day needs
- ◆ **Medical Practice Incorporation**
guidance to help you make
key decisions

MD Exo™
Your Expert Office



¹ Banking products and advice are provided by National Bank of Canada's Partnership Branch through a relationship with MD Management Limited.

Early Career Specialist

- Represent both the CMA and MD Financial Management
- Lead financial education seminars for medical students, residents, and new-in-practice physicians
- Promote CMA's benefits for members
- Facilitate orientation events for students and residents
- Special programs for IMGs and Canadian students studying abroad
- Close collaboration with PTMA partners across Canada

Introducing
MD MedEdCounsel™
Your team of MD Advisors and
Early Career Specialists dedicated
to medical students and residents.



Types of Seminars

- ◆ Physician Incorporation
- ◆ Debt Management / Debt Repayment Strategies
- ◆ RRSPs and TFSAs and Understanding Investments
- ◆ Debt Repayment vs. Investing
- ◆ Life, Disability, and Critical Illness Insurance (How much is enough? OMA vs. Private?)
- ◆ Credit Management
- ◆ Renting versus Buying a Home
- ◆ Transitioning to Practice
- ◆ Tax Tips
- ◆ CMA membership benefits

What Programs do we work with?

- ◆ Current Programs we work with include:
 - ◆ Student curriculum for all stages in medical school
 - ◆ Practice Management Curriculum with CMA
 - ◆ Family Medicine Academic Days
 - ◆ Various specialty groups
 - ◆ Touchstone IMG Program as well as various provincial programs
 - ◆ CFMS, OMSA, FWCM

Practice Management Curriculum

[Membership](#)

[Advocacy](#)

[Clinical Resources](#)

[Professional Development](#)

[Financial Planning & Advice](#)

[Practice Management and Wellness](#) > [Transitioning to practice](#) > [Practice Management Curriculum \(PMC\) for medical residents](#) > [Practice Management Curriculum \(PMC\) – program overview](#)

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Practice Management Curriculum (PMC) – program overview

The Practice Management Curriculum (PMC) is a series of informal, interactive seminars for family medicine and specialty residents. These seminars, designed to help residents ask the right questions when evaluating opportunities, complement medical training and encourage sharing of experiences and lifelong learning about managing a medical practice.

Partners in education

MD Financial Management has been working since 1996 with physicians and experts in the field to develop a generic practice management curriculum for Canadian teaching programs. As education partners, we encourage faculty to assume full editorial control of the curriculum for their respective programs.

Benefits of CMA membership

[MD Financial Management](#)

Build a solid financial plan with a CMA-owned firm

[Advocacy and representation](#)

Join more than 82,000 colleagues

[Clinical resources](#)

Point-of-care tools, journals, CME and much more

[Join the CMA](#)

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MD MANAGEMENT

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- ◆ Facebook: facebook.com/MDFinancialManagement



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