Prospect for Physicians

Doctors are easy to identify in your book of business or community. Dedicated Defined Benefit Services offers tax-advantaged Defined Benefit retirement plans for owner-only practices and cash balance programs for medical practices with 1-10 employees.

Identify Doctors Who Fit the Profile

First, look in your book of business for doctors who are self-employed or in a small practice with 0-10 employees. Generally, physicians who are 5-15 years from retirement are in peak earning years and are ready to save as much as possible for retirement. They are interested in learning about one of the best tax-advantaged solutions available today.

If you have clients who fit this profile, begin the conversation.

Want to expand your client base?

A simple web search can help you identify local prospects.

Many medical associations and state boards have online directories of physicians that you can search. As a plan member of a health and managed care organization, you can access local doctors by specialty. Also a local internet search in your area will list doctors, dentists and other medical professionals. Doctors who are employed by hospitals and university medical schools frequently have second sources of income from consulting, pharmaceutical companies, expert witness cases, and locum tenens opportunities. This side income can be used as the basis for a Defined Benefit retirement plan.

If you have a junior associate who wants to add new clients to your practice, identifying physicians with good potential might require a bit of research.

Specialties

Physicians in certain specialties are more likely to be self-employed, have few employees, earn high incomes and need tax solutions:

- Anesthesiologists
- Audiologists
- Endodontists
- Emergency Room
- Oral surgeons
- Orthopedists
- Pain Specialists
- Plastic surgeons
- Podiatrists
- Psychiatrists
- Radiologists

Marketing Resources to Support You

→ Special Considerations for Physicians

→ Presentation for Physicians

→ Defined Benefit Calculator

Listed below are examples of the types of websites that can help you target self-employed physicians in your community

Anesthesiologists

Professionals who are not hired directly by consumers are less likely to be listed on the internet but you can identify some prospects through their professional associations and journals. For example, "Anesthesia and Analgesics", lists the members of the Editorial Boards, many of whom practice as well as teach:

https://tinyurl.com/anesthesiologist-journal

Find practitioners in your area and send them a personal email or give them a call.

Another approach is to find specialists at nearby teaching hospitals and universities — many physicians who teach are also practitioners. Here are a couple of examples:

- Anesthesiologists from Illinois's Rush University Medical Center with contact information easily found on the web:
  https://doctors.rush.edu/
- A mix of specialists at New York Hospital for Special Surgery:
  https://www.hss.edu/physicians.asp

Psychiatrists

Psychiatrists and other specialties:

www.healthgrades.com allows you to search by location — state and city — and provides you a list of specialists in your town.

Radiologists

Society of Interventional Radiology:
www.sirweb.org — provides a list of specialists by state with contact information.

Endodontists

Easy to find in your town and state, most of them are in small practices and phone numbers and street addresses are included:

https://tinyurl.com/endodontist-list

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Dedicated Defined Benefit Services works with financial advisors nationwide to design retirement programs tailored to clients' needs. Each year, we calculate contribution options, prepare all required documents and tax forms, and provide ongoing consultation to help clients get the most out of their plans and stay in compliance with the IRS laws.

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