

UT COLLEGE OF MEDICINE CHATTANOOGA RESIDENTS & FELLOWS FINANCIAL HEALTH CURRICULUM

Financial Health Curriculum

Provided by

First Horizon Medical Private Banking and
First Horizon Advisors



For information or Questions Contact Us:

Carolyn Fryar 423.209.2628 (Office)

423-802-9894 (Cell)

cgfryar@firsthorizon.com (email)

Expert Assistance with What Matters Most to Your Financial Well-being

- Financial Planning - Helping create a road map for where you want to go, and providing guidance along the way as your career/life/family change.
- Banking – Overseeing cash management and lending needs.
- Asset Allocation – Reviewing 401k allocation, and at some point helping build an after-tax investment portfolio.
- Insurance – Reviewing life and disability insurance, and providing solutions if we see a situation where client is under insured.
- Asset Aggregation (eMoney) – Setting up your information on our asset aggregation portal. This would provide a clear view of overall wealth, and help you track this over time.
- Estate Planning – Drafting Wills and Power of Attorney documents
- Identity Theft – Making sure credit scores are frozen at the three credit agencies, and educating on how to use eMoney to monitor monthly transactions.
- MD Home Loan Financing – Auto Financing – MD Lines of Credit -- Practice Buy-ins -- now and as your career progresses.
- Real Estate Consulting – Providing guidance as you evaluate different real estate investment opportunities. We are not real estate agents, but we can help analyze the deal, and see how it plays into an overall plan.
- Physician Contract Negotiations – for those nearing the end of residency
- Student Loan Analysis and Planning

The financial series and related topics are being provided as informational and educational discussions at no cost to the UTHSC Residents and Fellows courtesy of First Horizon. Participants are under no obligation to enter into contract or agreement with First Horizon or its affiliates.