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PRIVATE CLIENT SERVICES

Affluent individuals, executives, physicians and business owners all share the same challenge of successfully creating and managing wealth. Our comprehensive services are designed to help you identify key goals and strategies that are critical to achieving success. We are your single-source financial advocate, working with you and your advisors to achieve a common goal. Think of MD Planning Group as your resource to simplify the demands of protecting and managing your wealth thus freeing time for your family, personal endeavors and your business.

- Accounts Receivable Factoring
- Accounts Receivable Protection
- Aviation Insurance
- Benefits Analysis & Products
- Business Insurances
- Business Overhead Expense Coverage
- Cafeteria (SEC 125) Plans
- Captive Insurance Structures
- Commercial Insurances
- Commercial Loans
- Comprehensive Estate Planning
- Comprehensive Financial Planning
- Deferred Compensation Planning
- Direct Participation Investments
- Directors and Officers Insurance
- Disability Insurance
- ERISA / Pension Bonds
- Home Loans



- Home and Auto Insurance
- Individually Managed Accounts
- International Insurance Products
- Life Insurance Products
- Life Settlements
- Long Term Care Insurance
- Medical Malpractice Insurance & Cost Reduction Strategies**
- Non-profit Deferred Compensation
- Payroll Services
- Practice Formation
- Primary Residence Protection Structures
- Property and Casualty Coverage
- Retirement Plan Analysis
- Retirement Plan Implementation
- Section 1031 Property Exchanges
- Structured Settlements
- Umbrella Coverage

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