

*Baltimore City Medical Society  
presents the inaugural annual  
educational symposium*

# PHYSICIANS LEADING PHYSICIANS TO FINANCIAL INDEPENDENCE

Saturday, September 9, 2023

Delta Hotels Baltimore North

5100 Falls Road

Baltimore, MD 21210

7:30 AM to 2:45 PM

# Agenda

7:30 am to 8:15 am - Registration/Continental Breakfast/Networking

8:15 am to 8:30 am - Welcome

8:30 am to 10:00 am - Introduction to Personal Finance: An Overview

Is there a relationship between human behavior and personal finance?

10:00 am to 10:45 am - Asset Protection



Dr. Jeffrey W. Steiner is an anesthesiologist in Dallas, Texas and is affiliated with multiple hospitals in the area, including Children's Medical Center Dallas and Parkland Health - Dallas. He received his medical degree from Texas Christian University and the University of Texas Health Sciences Center School of Medicine and has been in practice between 11-20 years.

Do you know how to protect your professional and personal assets from lawsuits and reduce your malpractice insurance costs?



Dr. Ty L. Bullard is an anesthesiologist in Chapel Hill, North Carolina and is affiliated with University of North Carolina Hospitals. He received his medical degree from University of Texas Southwestern Medical School and has been in practice between 11-20 years.

It's important to develop financial plans across professional and personal life cycles.

10:45 am to 11:00 am - Break/Snack

11:00 am to 11:45 am - Legally Mine



Daniel J. McNeff is the CEO of Legally Mine. In addition to running his own businesses for the last 20 years, he has served as the Senior Vice President of one of the Nation's largest financial services company for 15 years. He is a published author with one book and many magazine and newspaper articles. Mr. McNeff has conducted hundreds of seminars and is responsible for helping thousands of people protect their assets and reduce their tax liability.



**LEGALLY MINE**  
KEEP WHAT YOU EARN

*"Legally Mine is a legal service company designed to protect business and personal assets as well as finding legitimate means of lowering tax liabilities. The company has been in business in its current format since 2007 and currently has more than 12,000 clients primarily coming from the medical and dental communities. Our priorities are education of the medical and dental communities through our seminars and preparing our clients to defeat both trial attorneys and over burdensome taxes."*

# Agenda Continued

11:45 am to 12:30 pm - Lunch

12:30 pm to 1:15 pm - Debt Management

Repayment of financial obligations is key in minimizing debt.



AJ Schneider, Founder and CEO of Beyond the Green Coaching, uses a unique method of personal development and strategic financial planning to help clients understand their financial reality and change their relationship with money.

1:15 pm to 2:00 pm - Negotiations

What are the different approaches to negotiations?



Dr. Julius Kunle Oni is an orthopedic surgeon in Baltimore, MD and is affiliated with multiple hospitals in the area, including Johns Hopkins Hospital and Johns Hopkins Bayview Medical Center. He received his medical degree from Howard University College of Medicine, completed his residency at NYU Hospital for Joint Diseases and his fellowship at Rush University Medical Center.



Dr. Sarah Merritt is in private practice at Lifestream Health Center. She earned her medical degree at the University of Alabama in Birmingham. After residency in Anesthesiology at the University of North Carolina at Chapel Hill, she elected to pursue fellowship training in pain management at the Johns Hopkins Hospital.



Dr. Arnold-Peter C. Weiss is a hand surgeon with University Orthopedics in Providence, Rhode Island. He received his medical degree from Johns Hopkins University, completed an orthopedic surgery residency at Johns Hopkins Hospital, and a hand surgery fellowship at the Indiana Hand Center. He is currently the R. Scot Sellers Scholar of Hand Surgery, Vice Chairman and Professor at Brown Medical School.

2:00 pm to 2:45 pm - Physician Entrepreneurship



Dr. Ariel J. Warden-Jarrett is a family medicine physician in Bowie, Maryland and is affiliated with Luminis Health Anne Arundel Medical Center. She received her medical degree from George Washington University School of Medicine. She is an adjunct instructor in Family and Community Medicine at the University of Maryland School of Medicine.

Understanding risk/reward factors in supplementing physician income are keys to financial success.

## REGISTRATION FEES:

**\$99 - BCMS AND OTHER  
MEDCHI MEMBERS**

**\$50 - RESIDENTS, FELLOWS  
AND STUDENTS**

**\$199 - NON-MEMBERS  
(INCLUDES 1-YEAR  
DISCOUNTED MEMBERSHIP)**

## 3 WAYS TO REGISTER:

SCAN QR CODE



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