

WHY PROTECT?

Starting your career in the competitive world of dentistry is easier if you have an experienced advisory team by your side. From student to retiree we work with dentists through every stage of their career to provide insurance and business advice.



PROTECTTM
FINANCIAL



We know dentists

Protect was founded in 1995 by a dentist who became disabled and was unable to continue practicing. Our focus is exclusively on dentists, currently advising over 700 across Canada. In contrast, the typical insurance agent works with clients from all industries and career types. At Protect, we understand the career path of a dentist, the challenges of being a self-employed practice owner and the types of risks you will encounter. We specialize in you!

You need financial protection. We have you covered

We help our clients to secure the right financial protection in order to build a solid foundation. Get the right advice now, and as your needs change throughout your career.

Advice and value-added services at no additional cost

Working with us does not end when your policy is delivered. We are committed to providing you with relevant and insightful information throughout the different stages of your career and we never bill you by the hour.

We are experts!

Because we know dentists, we fully understand the demands of your occupation and the nature of disability claims for dentists. We hope you will never need to rely on this specialized expertise we provide, but if you do, you'll be very glad to have our claim experts on your side assisting you through the process.

You need a financial plan in place

We provide guidance around paying down loans, investing, saving taxes and growing your wealth, keeping in mind your short-term needs and long-term term goals. This allows you to focus your energies on being a dentist, confident that you are on the right path to achieving financial success.

WEALTH MANAGEMENT

Our 4-step process offers tailored solutions for clients with a wide variety of portfolios:

Discovery

We begin with a personalized discussion and detailed review of your financial statements

Design

Our comprehensive financial plan synchronizes all aspects of your busy and often complicated financial situation

Craft

Driven by the plan, we create a tailored portfolio based on a researched and evidence-based approach

Monitor

We review, rebalance, and continually research alternatives

PLANNING THE PATH AHEAD!

protectfinancial.ca | 1-866-919-3764