



The best preparation for tomorrow
is to do today's work superbly well.

- Sir William Osler

Wealth Management & Financial Counseling For Physicians and their Families

First we listen, then we act

Only by understanding your financial priorities can we help you achieve them. We begin by listening and getting to know more about your financial needs and goals, as well as your risk preferences and investing time frame. This allows us to offer informed advice and implement strategies tailored to your specific financial situation.

Scientific approach

We use an evidence-based approach to wealth management based on leading ideas from the world of academic finance, with an emphasis on tax-efficiency and low costs.

We specialize in retirement planning

We have almost 20 years of experience in helping physicians successfully plan for retirement. Based on this experience, with the assistance of sophisticated financial planning software, we design a retirement savings strategy tailored to your unique financial situation. At retirement, we help optimize the timing and tax efficiency of your post-retirement withdrawals. Our goal is to ensure a sustainable retirement income so that you can enjoy your retirement without financial concerns.

Relax

We are here for you whenever you need us. We understand that life, and financial priorities, can change. We will be there each step of the way to help you deal with unexpected events and stay on course in achieving your financial goals.

Client-Focused

At Shearwater Capital, your financial success is our only priority. We are a fee-only investment advisory firm. We receive no incentives or payments from the companies whose securities we use for client accounts. We sell no in-house investment products and avoid all soft-dollar relationships that might influence our advice. We are therefore free to choose the best investment products for our clients in a completely objective manner.

Who We Are



By Physicians for Physicians

Our company founders have first-hand experience with many of the financial issues and challenges commonly faced by physicians. They also have years of experience in helping physicians save for retirement and manage their financial assets. This provides Shearwater Capital with a unique ability to help our physician clients develop sound financial plans, invest wisely and attain financial security.

What We Do

