E2E Financial®, LLC
Ever to Excel...

Creating a Powerful Financial Future

for dentists

Andrés M. Romero, ChFC, CFP®

Financial Coach & Planner for Dentists | Founder of E2E Financial

20+ years advising dentists & their families on financial planning, investment management, retirement planning and more

- Presenter at major dental conferences, schools, and study clubs since 2005
- Founded E2E Financial (2015) – dedicated to dentists and just celebrated our 10th Anniversary
- Active member, Academy of Dental Management Consultants (since 2005)
- Bachelor's in Finance, Boston College. Their motto "Ever to Excel" inspires his approach
- First-generation American; credits family's hard work for his drive and perspective
- Former Bloomingdale's executive; known for his signature bow tie & class-act client service

Protect Your Credit

- Check your credit score and reports for free at CreditKarma.com or AnnualCreditReport.com.
- Use banking apps for quick credit score checks and maintain a 750+ FICO for practice financing.
- Set up automatic payments to avoid missed payments and build strong credit history.

Insure Future Income

Protect your multimillion-dollar earning potential with insurance.
(you can do this while you're still in school)

REQUEST A QUOTE

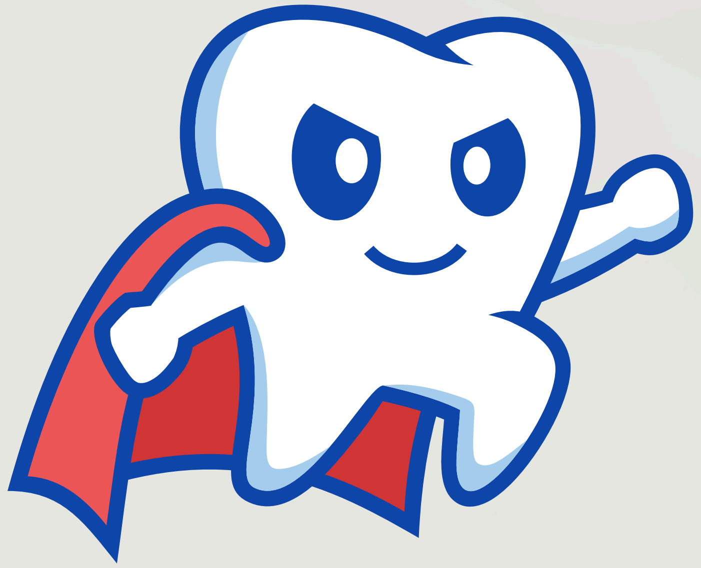
DISABILITY INCOME INSURANCE

REQUEST A QUOTE

Assemble your dental advisory team

Start Investing

- Invest in continuing education for business, leadership, and clinical skills by establishing a CE budget.
- Start investing as soon as you can. Sign up for 401K plan and/or have a Roth IRA account.
- Have the power of compound interest work for you!



Do Dentistry ASAP

- Practice dentistry to improve your speed and expertise!
- Talk with us to get started!

Additional Resources

Financial Future Playbook

Reccomendations for Dentists by Dr. Jay Wisner

Student Loan Planner on Instagram

Our Info

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