

## FPA of Metro New York 20th Annual Forum



### **Carolyn McClanahan, M.D., CFP®**

Founder, Life Planning Partners, Inc.  
Co-founder of Whealthcare Planning, LLC.

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Dr. McClanahan began her career as a physician in 1990 after completing her undergraduate degree at Mississippi University for Women and medical school at University of Mississippi. She completed her residency in Family Medicine at the Medical College of Virginia. After a couple of years in private practice and emergency medicine practice in Richmond, Virginia, she returned to the Sunny South of Jacksonville, Florida to teach on faculty at the University of Florida, Shands, Jacksonville. She also worked in various emergency departments in the Jacksonville area.

Finding that most financial planners were mainly interested in managing her portfolio and not in providing the advice she needed, she enrolled in the CFP® curriculum at the University of North Florida. Realizing the similarities between medicine and financial planning, and feeling more empowered by being able to help people plan for their future, Dr. McClanahan decided to make a career change into financial planning.

In addition to working in her financial life planning practice and software company, Dr. McClanahan provides education to financial planners and health care professionals on the interplay between health and financial issues, particularly regarding insurability, health care costs, and health care reform. She writes for Forbes, CNBC, and Financial Planning Magazine covering issues intersecting money and medicine.

Dr. McClanahan is a member of the National Association of Personal Financial Advisors (NAPFA,) the Financial Planning Association, and the American Academy of Family Physicians. She is quoted regularly in numerous publications such as The Wall Street Journal, New York Times, and the Washington Post. She has also appeared on CNBC, Hardball, AC360, and NPR.