

Join us for an informative lecture on:

PLANNING FOR SUCCESS

With this information, you can be confident about the successful future of your dental practice.



Daniel Bacarri
Co-founder of National
Practice Transitions



Charles Feitel
President of Health-Pro
Realty Group



Reese Harper
CEO of
DentistAdvisors.com



Kay Huff
Director of Dental
Coaching at Benco Dental



Wayne Oplinger
Transition Analyst at
Benco Dental

June 15, 2018

8:30am to 3:30pm

Registration 7:30am to 8:30am

TPC Potomac Clubhouse

10000 Oaklyn Drive, Potomac, Maryland 20854

R.S.V.P. to Deborah Wargo at 570.602.6807



DENTISTADVISORS.COM



Daniel Bacarri | Co-founder of National Practice Transitions | Planning for a Successful Practice Sale at All Stages of your Professional Career

Course Description:

Whether you are 5 years away, 1 year or in the process of selling your dental practice there are steps you can take to assure you will have a successful practice transition. This course will go through the different stages of this important decision and identify key considerations and steps you can and should be taking to have a positive and rewarding experience. The course will discuss valuations and how to prepare your practice to obtain the highest sale price. Pre and post sale employment contracts, sale documentation, tax ramifications of a sale and some of the obstacles and often asked questions our clients have asked throughout the years will also be discussed in detail.

Dan is the Co-founder of National Practice Transitions ("NPT, LLC"), a highly recognized and successful dental practice brokerage and consulting firm credited with the sale of and appraisal of hundreds of dental practices in many territories throughout the continental United States. His duties with the company involve the management of the New England territory, NPT's oldest and most established market, including appraising and consulting with numerous dentists and specialists with the transition of their dental practices. While the majority of his time is spent in the capacity of a dental practice broker, Dan also uses his legal training to represent parties who are either buying or selling a dental practice. Over the last 20 years, Dan has guest lectured at the invitation of numerous dental societies and organizations on many topics involving or related to the transitioning of dental practices receiving excellent audience reviews. He is the published author of numerous articles including "Alternative Approaches In Practice Transitions", "Landlords: An Often Overlooked Obstacle For Closing" and "Non-Competition Agreements in Dental Practice Transitions" and "Employment Contracts in Dental Practice Transitions". Dan holds a Bachelor of Business Administration in Marketing from Hofstra University, in New York and a Juris Doctorate from Roger Williams University School of Law.

Charles Feitel | President of Health-Pro Realty Group | Commercial Real Estate & Your Dental Practice

Should I lease or buy ? How long does the commercial real estate process take ? How much money will I need ? How do I know if I have a "good real estate deal" ? How much is the realtor going to charge me ? How do I prevent the landlord from taking advantage of me ? How long of a lease should I sign ? In a transition how do I negotiate a good lease ?



Since 1996 Charles Feitel's firm, Health-Pro Realty Group, has specialized in the representation of medical and dental professionals with their commercial real estate needs. He is recognized as an industry leader in Health Care Real estate and is a featured speaker in health care summits in Washington D.C. PA and New York. Having worked with hundreds of doctors, dentists and HealthCare providers over the years, Mr. Feitel has learned the "ins and outs" of medical/dental real estate. Since 1996 he has represented medical/dental real estate transactions in excess of \$800,000,000.00. No commercial real estate broker in the mid-Atlantic region is more experienced in the skillful representation of HealthCare professionals. Mr. Feitel graduated from The University of Michigan in 1982 and The University of Toledo College of Law in 1985.



Reese Harper | CEO of DentistAdvisors.com | How Much Wealth Do I Need to Make Work Optional?

There's a moment in your future when work will no longer be a necessity. You'll have enough wealth to support your lifestyle indefinitely and the choice will be yours to hang up the drill or continue practicing. So when will that moment arrive? In this presentation, Reese Harper, CFP® will help you calculate your Total Term, or progress toward financial independence. You'll gain new perspective on what it means to build wealth and understand how to measure your financial performance in relation to your goals.

Reese Harper is the founder and CEO of DentistAdvisors.com, a registered investment advisory firm which focuses exclusively on dentists and specialists. His proprietary planning methodology called Elements® is used by dentists across the country to track their progress toward financial independence. Reese is also host of the Dentist Money™ Show podcast, a regular contributor to major dental publications, and a popular speaker at dental conventions, continuing education events, and dental districts all over the U.S.

Kay Huff | Director of Dental Coaching at Benco Dental | Keep Going, Keep Growing

While patient care is the primary focus, the patient experience is driven by the systems and the team's performance. Identifying the key performance indicators (KPI's) to assess the effectiveness of your practice operations; will identify performance gaps, necessary adjustments to systems, communication and other strategies, as needed.



Kay Huff RDA began her career in dentistry as an assistant to an assistant in 1981. With great determination, Kay gained knowledge and experience as she worked her way to the front office team. Kay defined herself as being a "true team player" in positions of Treatment Coordinator and Office Manager, always doing whatever it took each and every day to make a difference in her practice. It was over 30 years ago that Kay began helping teams as a Dental Practice Coach, and she proudly has been the driving force for hundreds of practices to reach and exceed their professional goals. Kay is passionate about her work and carries a strong background in dental business systems, team motivation, leadership, and practice profitability. Kay is a dynamic dental speaker who fills her programs with plenty of laughs and tangible practice management tools they can take directly back to their practice and apply immediately. She is a Certified Consultant in Employment Law Compliance with Bent Ericksen & Associates, as well as a board member of the Academy of Dental Management Consultants (ADMC), the Speaking Consulting Network (SCN) and a member of the American Association of Dental Office Managers (AADOM). Additionally, Kay received first place in the Spotlight on Speaking Competition at the 2016 Speaking Consulting Network conference in Santa Fe, New Mexico.



Wayne Oplinger | Transition Analyst at Benco Dental | Current State of the Associate Marketplace & How to Creatively Find the Right One for your Practice?

If you are considering hiring an Associate, this course will provide you with some of the key statistical data when it make sense financially. In addition we will cover why it's difficult these days to hire an Associate and won't get any easier in the near term as well as ways to improve your chances of hiring the right Associate the first time. We will also discuss Associate pay plans and which ones are having the best success rates throughout the country. Finally, since the process of finding potential Associate candidates is very difficult we will discuss creative ways to get you more candidates that go beyond posting an Ad in your local state journal or listing on an internet job board.

Wayne Oplinger, started with Benco Dental as a local Territory Representative 6 years ago, in 2011, covering Westchester County NY, Southern CT and Northern NJ. After 3 years, he successfully built his territory sales in excess of \$3 million dollars. After 4 years, Benco Dental asked Wayne to take on a new position, Practice Transitions Analyst. In this capacity, Wayne would be the single point of contact for Benco customers, TRs and transition partners, by developing customized transition solutions for Benco Customers. Prior to joining Benco Dental, Wayne was a small business owner for over 15 years. Wayne can relate well to dentist owners because his small business, albeit not in dental, was very similar in production figures, overhead, and profits. In addition to being a transitions resource for Dentists throughout the country, Wayne is well sought out speaker, speaking at major dental meetings, local study clubs, as well as dental schools.