REESE HARPER

A FINANCIAL THOUGHT LEADER IN DENTISTRY

Interactive Financial Planning Presentations to Help Dentists Make Smart Financial Decisions

4 Keys for Dentists to Achieve Financial Independence

Did you know dentists consistently rank among the highest-earning professionals in the nation, yet retire six years later than the average American?

PRESENTATION HIGHLIGHTS

In this candid and discussion-oriented presentation, Reese Harper, CFP® highlights the biggest reasons dentists retire later than they should and addresses four key questions every dentist should be able to answer:

How much wealth do I need to make work optional?

Do I have the right mix of assets in my portfolio?

Am I using my income wisely, and saving enough money?

Am I taking the right amount of risk?

OBJECTIVES

Understand what it means to build wealth

Learn why dentists retire later than they should

Use the Elements® table of financial indicators to track financial progress

Calculate Total Term progress toward retirement

5 Steps to Better Investment Performance

The noisy world of investing makes it hard to know where your money should go and feel confident your portfolio is managed the right way.

PRESENTATION HIGHLIGHTS

The truth is one bad investment can erase several years of hard work. In this cut-to-the-chase presentation, Reese Harper, CFP® brings a complicated subject down to earth and explains how to overcome the costs of:

Irrational investor behavior & poor investment selection

Underestimating the proper amount of investment risk

Hiring the wrong advisors

A mismanaged portfolio

OBJECTIVES

Understand how financial markets work

Identify and overcome behavioral tendencies that lead to poor investments

Know the questions to ask when hiring a financial advisor

Learn the principles followed by world-renowned economists

DURATION: 3 Hour Full Presentation (May be modified to accommodate shorter meeting times)

FEATURES: Live Audience Polling with Mobile Devices - Elements® Booklet for Work Session - Total Term Guidebook - Open Q&A Throughout Presentation

AUDIENCE: Dentists and Spouses

To book Reese for your next event visit: **DentistAdvisors.com/speaking** info@dentistadvisors.com (800) 890-8095

Additional Courses to Take The Learning Deeper!

What You Need to Know about Financial Advisor Fees

Do you know exactly how your financial advisor gets paid? The answer can have a major impact on your investment performance and your net worth. At the end of the day, your advisor should be incentivized to put your best interest first. Unfortunately, that's not always the case. But a simple explanation of fee models within financial services can help you find the best person to guide your decisions.

LEARNING OBJECTIVES

Become familiar with the five most common ways financial advisors get paid

Learn how different compensation models may influence your advisor's decisions

Know which questions to ask before hiring a financial advisor

9 People Dentists Need to Know

Do it yourself, or hire someone else? Bookkeeping, marketing, financial planning, lease negotiations, staff training, insurance analysis, and a bazillion other things. You could probably do it all if you had an extra fifty hours a week. But in the real world, a dentist has to decide which tasks are worth tackling alone, and which ones should be outsourced.

LEARNING OBJECTIVES

Calculate the true cost of doing a project on your own

Understand how involved a dentist should be within each area of practice management

Identify the important players on a dentist's team of professionals

What The Heck Does "Financial Planning" Even Mean?

You have a 401(k). Check. You have a life insurance policy. Check. But do you have a comprehensive plan to reach your wealth building potential? The definition of financial planning is vague at best, and most people don't even know what a "financial advisor" is supposed to do. It's time to set the record straight and start checking ALL the boxes that lead to smart financial decisions.

LEARNING OBJECTIVES

Learn what it means to maintain a complete and accurate view of your financial picture

Create a calendar to address the most important elements of your financial plan on a recurring basis

See the tools that other dentists are using to stay organized, make proactive decisions, and put their financial strategies into action

Meet Reese

Reese Harper is the founder and CEO of Dentist Advisors, 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. Reese is a CFP® (CERTIFIED FINANCIAL PLANNER™) with CLU® and CHFC® designations from the American College of Financial Services and has a Masters in Finance from the University of Utah.

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