

Exploring the Evolution of the Ortho Practice

January 28-30, 2022 ▪ Loews Royal Pacific Resort at Universal Orlando ▪ Orlando, FL, USA

Friday, January 28

7:30am-8:25am	Breakfast		Pre-Function West
8:25am-8:30am	Opening Remarks	J. Kendall Dillehay & DeWayne McCamish	
8:30am-10:00am	The Triple DDD Effect: How Data-Driven-Decisions Create Competitive Advantage	Mary Beth Kirkpatrick & Ryan Moynihan	Oceana Ballroom
10:00am-10:30am	Morning Refreshment Break/Exhibit Hall		Pacifica Ballroom
10:30am-11:00am	Inside the Numbers (and Trends) of Orthodontic Practice Modalities	Brandon Hackworth	Oceana Ballroom
11:00am-12:00pm	My Practice Journey with Smile Doctors	Ben Fishbein	
12:00pm-1:00pm	Lunch Break/Exhibit Hall		Pacifica Ballroom
1:00pm-1:30pm	Practice Growth: How we went from "Zero to Sixty!"	Regina Blevins	
1:30pm-3:30pm	Practice Modality Panel Discussion <i>Moderated by Chris Bentson</i>	Anil Idiculla, Jamie Reynolds, Damon Barbieri, Scott Law & Elizabeth Campbell	Oceana Ballroom
3:30pm-4:00pm	Afternoon Refreshment Break/Exhibit Hall		Pacifica Ballroom
4:00pm-5:00pm	Lessons Learned: Orthodontic Wisdom Passed Down Through Three Generations	Herb Hughes & Justin Hughes	Oceana Ballroom
5:00pm-6:00pm	Reception/Exhibit Hall		Pacifica Ballroom
9:30am-6:00pm	Exhibit Hall Open		Pacifica Ballroom

Saturday, January 29

7:30am-8:30am	Breakfast		Pre-Function West
8:30am-9:00am	Ortho/Pedo Partnerships: What to Ask Before You Get Married to Avoid Divorce	Heather Hopkins	
9:00am-10:00am	My Practice Journey as a Solo Practitioner, Educator and now a member of an Orthodontic Support Organization	Stuart Frost	Oceana Ballroom
10:00am-10:30am	Morning Refreshment Break/Exhibit Hall		Pacifica Ballroom
10:30am-11:00am	Merging Existing Orthodontic and Pediatric Dentistry Practices to Thrive in Today's Changing Environment	Jeril Cooper & K.C. Dyer	Oceana Ballroom
11:00am-12:00pm	A Transition Model That Works	Greg White	
12:00pm-1:00pm	Lunch Break/Exhibit Hall		Pacifica Ballroom
1:00pm-2:30pm	Mission Not Impossible: Your Weaknesses are Your Superpowers	Corinne Devin	
2:30pm-3:30pm	From Bonds to Braces: Pivoting into Private Practice, Prototypes, and Pedagogy	Chris Bonebreak Jackson	Oceana Ballroom
3:30pm-4:00pm	Afternoon Refreshment Break/Exhibit Hall		Pacifica Ballroom
4:00pm-5:00pm	Panel Discussion <i>Moderated by Daniel Keith</i>	Saturday Speakers	Oceana Ballroom
5:00pm-6:00pm	Reception/Exhibit Hall		Pacifica Ballroom
9:30am-6:00pm	Exhibit Hall Open		Pacifica Ballroom

Sunday, January 30

7:30am-8:30am	Breakfast		Pre-Function West
8:30am-9:30am	How to Recruit and Retain Orthodontic Associations in a Competitive Market	Shannon Patterson	Oceana Ballroom
9:30am-9:55am	Morning Refreshment Break		Pacifica Ballroom
9:55am-10:00am	Wrap-up Remarks	J. Kendall Dillehay & DeWayne McCamish	
10:00am-11:00am	Financial Decisions Orthodontists Must Get Right	Dan Wicker	Oceana Ballroom
11:00am-12:00pm	Financial Outcomes with Models	Brad Kucharo	

7:30am-8:25am | Breakfast

8:25am-8:30am | Opening Remarks

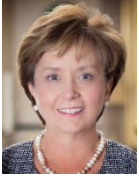
Presented by J. Kendall Dillehay, DDS, MS, AAO 2021-22 President & DeWayne McCamish, DDS, MS, General Chair

8:30am-10:00am

1.50 CE

The Triple DDD Effect: How Data-Driven-Decisions Create Competitive Advantage

Presented by Mary Beth Kirkpatrick & Ryan Moynihan, MBA



Kirkpatrick

Data driven decisions have become the force required to achieve competitive advantage. Differentiation in a competitive market stem from the difference between thinking and knowing and the courage to identify and solve the challenges we face as business owners. Join Mary Beth Kirkpatrick and Ryan Moynihan to gain an understanding of the foundations of business success. From your vision to your values to your daily management, learn how your practice can thrive in a changing and evolving market.

Learning Objectives:

- Identify strategies for establishing business foundations and the tools to help effectively run an orthodontic business.
- Cultivate practice metrics, what really matters to your business and why.
- Evaluate the evolution of the new patient journey from call to close.



Moynihan

Mary Beth Kirkpatrick, Managing Partner of Impact360 Consulting, has shared her operations management and process implementation expertise with orthodontists and orthodontic teams across the US, Canada and Australia over the past 30 years. She leads an experienced team of consultants who elevate practice growth, administrative skills, and clinical efficiency as they develop high performance teams. Mary Beth is uniquely talented in making practice data meaningful and actionable for her clients to transform their practices into smarter, happier and more profitable businesses. Mary Beth is the Founder and President of Gaidge, a business analytics software for orthodontists. Fully integrated with practice management systems, Gaidge leverages practice insights using in-depth business intelligence and data visualization dashboards to enhance operations, identify opportunities and drive practice performance.

Disclosure: Consultant (Impact360), Stock Shareholder (Gaidge)

Ryan Moynihan joined Gaidge as the CEO in 2017 bringing a diversified background in finance, analytics, strategy, sales, marketing, business development, product management and operations. He has over 21 years' experience across many Fortune 100 companies in the areas of health care, consulting, and technology and has a passion for growth and team building. Ryan spent time working at Disney, Intel, Ernst & Young and Miller Brewing Company before earning his MBA from Georgetown and prior to joining Gaidge, devoted the past 15 years of his career to the Dental/Orthodontic industry working at 3M and Ormco in marketing and sales leadership positions.

Disclosure: Stock Shareholder (Gaidge)

10:00am-10:30am | Morning Refreshment Break/Exhibit Hall

10:30am-11:00am

0.50 CE

Inside the Numbers (and Trends) of Orthodontic Practice Modalities

Presented by Brandon Hackworth, CAE



Hackworth

The way orthodontists practice today is vastly different from the past. That much you already know. But just how much has it changed, and more importantly, how might it continue to evolve in the years ahead? In this presentation, we will review the history of orthodontists' distribution across various practice modalities, examine current practice modality data and trends, and reveal forecasts for how orthodontists may practice in the future. Moreover, we will present additional demographic data that impact how orthodontists choose to practice, as well as how their chosen practice modalities impact them.

Learning Objectives:

- Understand how orthodontists' distribution across various practice modalities have changed over time
- State high level statistics regarding orthodontic practice modalities and other demographics
- Project how orthodontists' distribution across various practice modalities may change in the future

Brandon Hackworth serves as the Director of Membership at the American Association of Orthodontists (AAO). He joined the AAO staff in 2013. In his role, Brandon oversees all recruitment and retention strategies to drive membership growth for the association. He also closely monitors membership data, including practice modalities and other demographics, to

identify trends and recommend changes to the association's membership model and policies. Brandon holds the Certified Association Executive (CAE) designation from the American Society of Association Executives (ASAE).

11:00am-12:00pm

1.00 CE

My Practice Journey with Smile Doctors



Fishbein

Presented by Ben Fishbein, DDS

Join Dr. Fishbein as he discusses the 6-year practice journey of Fishbein Orthodontics.

Learning Objectives:

- Evaluate the benefits of joining a DSO.
- Review why Fishbein Orthodontics partnered with Smile Doctors.
- Implement Fishbein Orthodontics' best practice management and marketing tips to go from a 6-person team to a 90+ person team over a 6-year period.

Dr. Ben Fishbein is the founder of Fishbein Orthodontics. Partnering with Smile Doctors this year, Dr. Fishbein now serves as the Regional Operations Doctor for Florida, as well as playing a role in both Business Development and Clinical Champions for Smile Doctors. Dr. Fishbein also holds an In-Office course called Fishbein Fundamentals, which has hosted more than 400 orthodontists and/or their team members.

Disclosure: Stock Shareholder (Smile Doctors)

12:00pm-1:00pm | Lunch Break/Exhibit Hall

1:00pm-1:30pm

0.50 CE

Practice Growth: How we went from "Zero to Sixty!"



Blevins

Presented by Regina Blevins, DDS, MS

Join Dr. Blevins on a journey of how two friends merged their practices and grew from four locations to thirteen. She will discuss how they leveraged their individual talents, thought outside the bracket and became one of the leading aligner practices in North America.

Learning Objectives:

- List 3 key areas that drive increased profitability.
- Stay more connected to patients utilizing virtual care.
- Create a strategy for allowing the office and clinical team to help the practice create a wow patient experience.

Dr. Regina Blevins has been a co-owner of Minnesota Orthodontics for thirty years. She is an Align Technology Faculty member and awarded the distinction of being one of their Master Speakers. She is also Clinical Adjunct Faculty at the University of Minnesota with her teaching and lecture focus on aligner treatment and mechanics.

Disclosure: Consultant, Stock Shareholder, Honorarium (Align Technology)

1:30pm-3:30pm

2.00 CE

Practice Modality Panel Discussion moderated by Chris Bentson, BS

Join this interactive discussion with Drs. Anil Idiculla, Jamie Reynolds, Damon Barbieri and Scott Law along with Elizabeth Campbell, MBA. Each participant will contribute to an informal discussion about their practice modality, touch on their own experiences and engage with moderated audience Q&A.

Learning Objectives:

- Assess various practice modality options from experienced peers.
- Outline the advantages and disadvantages of various practice modalities.

Anil Idiculla, DMD is an orthodontist who began his private practice career in 2008, and grew his brand, i-Orthodontics, into 5 locations across Colorado, along with a non-profit orthodontic clinic in Jinja, Uganda. He is passionate about investing in people and their hearts, while helping them find their true authenticity to shine bright. In 2019, he was blessed to joined Corus Orthodontists and considers it the best decision he has ever made in his professional career.

Disclosure: Stock Shareholder (Corus Orthodontists)



Idiculla



Reynolds

Jamie Reynolds, DDS, MS attended the University of Michigan for both his undergraduate and dental degree (Go Blue!) and earned his master's degree in orthodontics from the University of Detroit-Mercy. He is a Diplomate of the American Board of Orthodontics, and a member of several dental and orthodontic societies, including the American Dental Association and the American Association of Orthodontists. Dr. Reynolds consults for several leading orthodontic companies, including OrthoFi and Orthodontic Partners--both of which he co-founded--and has lectured in several countries on three continents.



Barbieri

Damon Barbieri, DDS, MS is a graduate of UOP Dental ('06) and served as Chief Orthodontic Resident at Temple University ('10). He is the founder of Barbieri Orthodontics, located in Nashville TN, and he recently co-founded Southern Orthodontic Partners (SOP); an OSO whose mission is to be the preeminent orthodontic platform in the Southeast. Dr. Barbieri is a proud SOP board member, along with serving as their Director of Clear Aligner Therapy.

Disclosure: Stock Shareholder (Southern Orthodontic Partners)



Law

Scott Law, DMD, CAGS is a wet fingered orthodontist charged with overseeing the clinical processes and responsibilities for Smile Doctors, an orthodontist owned orthodontic group. After completing residency at Jacksonville University School of Orthodontics in 2009, he and his wife Jessica purchased a small practice from a retiring orthodontist in Killeen, Texas. Using techniques based on customer service, fun, empowerment and excellence they grew that location to one of the largest practices in the U.S. Looking out on the horizon in 2015 and seeing the threats and opportunities facing orthodontics, they decided to scale their business based on the principle of Love On People First. Together with partners Dr. Dana Fender and Dr. Greg Goggans, Smile Doctors has grown to over 300 orthodontics only partner practices. As an organization we are constantly seeking transitioning doctors and/or associates that align with our culture of loving on people and seeking excellence as we deliver the Ultimate Patient Experience.



Campbell

Elizabeth Campbell, MBA is the Founder and CEO of myOrthos. Previously, she was a healthcare investor and operator, having held investment roles at LLR Partners and SV Health Investors, where she focused on growth equity and venture capital investments in healthcare services and technology companies. Prior to investing, she was Vice President of Business Development at AG Mednet, a healthcare technology company enabling electronic transport of diagnostic images in clinical care and in clinical trials. Earlier in her career, Elizabeth worked as an Associate for the Boston Consulting Group. She earned an M.B.A. with honors from the Wharton School at the University of Pennsylvania, where she has taught a course in Healthcare Finance, and a B.S. in Commerce from the University of Virginia, where she graduated with honors. Elizabeth lives in Boston, MA with her husband, two boys and a goldendoodle.

3:30pm-4:00pm | Afternoon Refreshment Break/Exhibit Hall

4:00pm-5:00pm

1.00 CE

Lessons Learned: Orthodontic Wisdom Passed Down Through Three Generations

Presented by Herb Hughes, DDS & Justin Hughes, DDS, MS



Herb Hughes

Drs. Herb & Justin Hughes will share their experiences and wisdom spanning 3 orthodontic generations. They will openly discuss how over the past 6 decades they have maintained a thriving practice through many challenging times. Tried and true as well as brand-new techniques, appliances and philosophies will be discussed so that participants will have practical take home pearls that can be easily implemented into their practices. Whether you're just starting your career or a seasoned practitioner you will find this presentation both worthwhile and magically entertaining.

Learning Objectives:

- Entice prospective adult patients with an aesthetic treatment area that offers clear choices.
- Acquire practical lessons learned that will help build a successful orthodontic business that can last for many decades.
- Perform "The Magician's Choice" and develop the mindset of a magician to solve your problems.



Justin Hughes

Dr. Herb Hughes is a second-generation orthodontist and his son, Justin, joined him in practice to become the third-generation orthodontist in their family. He received his DDS from VCU School of Dentistry and his orthodontic degree from Boston University. He has lectured throughout the US and shared his wisdom both tried and true as well as brand new to fellow colleagues. He is the past president of the VAO and currently is a board member on the AAO Council on Communications.

Demonstrating longstanding commitment to dental health and orthodontic excellence, Dr. Justin Hughes has completed rigorous training and follows the legacy of his family in superior dental and orthodontic care. He received his bachelor's degree from Wake Forest University, his Doctorate of Dental Surgery degree from Virginia Commonwealth University, and his Master's in Orthodontics from the University of Iowa. In addition, Dr. Justin also completed a one-year general practice residency at St. Barnabas Hospital in New York City prior to beginning his orthodontic residency in Iowa. He has been practicing in Alexandria, VA with his father since 2016.

7:30am-8:30am | Breakfast

8:30am-9:00am

0.50 CE

Ortho/Pedo Partnerships: What to Ask Before You Get Married to Avoid Divorce



Hopkins

Presented by Heather Hopkins, DMD, MS

As our industry continues to evolve, many doctors are taking a hard look at their practice model. Many are considering selling to a DSO, buying up more local practices, or considering a partnership with another specialty. Dr. Hopkins has had a unique professional journey with experiences including working for a General Dentist at a high-end Beverly Hills practice, chased a pie in the sky buy in as an associate, owned a 3-location private practice, and then partnered with a pedo/GP group 6 years ago. Join this lecture as she walks through her journey and what she has learned about the future of our specialty.

Learning Objectives:

- List pros and cons of multiple practice models.
- Understand why the next generation of orthodontists cannot afford to buy our practices.
- Identify several advantages as well as challenges of an ortho/pedo partnership.

Dr. Heather Hopkins attended the University of Kentucky for Dental School, and the University of Louisville for her orthodontic residency. She is a partner at an ortho/pedo/GP private practice in Lexington, South Carolina.

9:00am-10:00am

1.00 CE

My Practice Journey as a Solo Practitioner, Educator and now a member of an Orthodontic Support Organization



Frost

Presented by Stuart Frost, DDS

If you would have asked him a year ago about his future in orthodontics, Dr. Frost would have told you that it didn't include being a part of an OSO. In this lecture, he will share with you his thought process and journey to where he is today, a partner in an OSO. He will also clear up any misconceptions and myths about OSO's and provide a clear understanding of their value. Dr. Frost believes that our profession is still the best specialty in dentistry and no matter if you are a solo practitioner, associate or working in a large organization the future is bright as you want to make it.

Learning Objectives:

- Debunk the myths and misconceptions of joining an OSO and be able to see the benefits vs cost to join such an organization.
- Understand what an OSO is and how they operate in the space of orthodontics.
- Comprehend how these organizations can help reduce stress to a practitioner and help them concentrate on the patients and beautiful outcomes.

Dr. Stuart Frost attended UOP for his dental followed by University of Rochester TMJD Fellowship for 1-year and 2-year orthodontic certificate. He started a practice from scratch in 2000. In 2006, he began teaching at UOP orthodontics till present, and has lectured in 35 different countries on various topics from Passive Self-ligation, Gummy Smile non-surgical correction, TADs and finishing techniques including hard and soft tissue contouring at the end of treatment. He is passionate about creating beautiful smiles and wrote a book on the artistry of orthodontics.

10:00am-10:30am | Morning Refreshment Break/Exhibit Hall

Merging Existing Orthodontic and Pediatric Dentistry Practices to Thrive in Today's Changing Environment

Presented by Jeril Cooper, DMD & K.C. Dyer, DDS, MDS



Cooper

In today's changing environment, sometimes thinking outside the box and taking a risk can be rewarding. Pediatric Dentistry and Orthodontic combined practices are abundant and profitable, but most are created from the ground up or by having one service and adding the other as a start-up. In this lecture, Drs. Cooper and Dyer will discuss their journey in merging existing orthodontic and pediatric dentistry practices to create a combined ortho-pedo practice.

Learning Objectives:

- Determine if combining your orthodontic practice with a local pediatric dentistry practice is a viable possibility.
- Evaluate how the dental community in your area will respond to such a merger.
- Consider different human resource, benefits, accounting, and retirement roadblocks that may be encountered.



Dyer

Dr. Jeril Cooper received his undergraduate degree from Carson-Newman University. He then graduated from the Medical College of Georgia School of Dentistry in 2003 followed by an orthodontic residency also at the Medical College of Georgia. Dr. Cooper then partnered with Dr. DeWayne McCamish and Dr. K.C. Dyer in Chattanooga, TN. In 2019, their practice merged with another local orthodontic practice and a large pediatric dentistry practice to create Pediatric Dentistry & Orthodontics of Chattanooga.

Dr. K.C. Dyer received his Bachelor of Arts in Economics from Vanderbilt University. He attended dental school at University of Tennessee College of Dentistry and then continued in Memphis, TN for his orthodontic residency receiving his Master of Dental Science. Upon graduation, he joined the practice of DeWayne McCamish and Randy Cooper as McCamish, Cooper & Dyer Orthodontics. In June of 2019, this practice was merged with an existing pediatric dentistry and an existing orthodontic practice to form Pediatric Dentistry and Orthodontics of Chattanooga.

A Transition Model That Works

Presented by Greg White, DMD, MSD



White

Orthodontists everywhere are exploring the best path forward for them and their practices during this pivotal moment in dentistry. Disruptions are constant and inundating their lives in unprecedented ways. The only wrong choice in our current climate is no choice at all. In this lecture, Dr. Greg White will share a transition model that truly works for the practitioner, their team, their patients, their community, and their legacy.

Learning Objectives:

- Outline the current transition models available to practitioners.
- Assess how private equity investments have changed practice valuations in dentistry in general, and orthodontics specifically.
- Understand the after-retirement passive income component to a unique practice transition model.

Dr. Greg White is one of the founding partners of White, Greer and Maggard Orthodontics, formed in 1991 and currently one of the largest, privately-owned pediatric and orthodontic group practices in the country. He has been actively practicing orthodontics for more than 25 years. Dr. White values building meaningful and lasting relationships, has a high propensity for action, a commitment to excellence, and an entrepreneurial spirit. He is proving to be a visionary in the dental industry, specifically in his specialty, with a deep understanding of the market and the ever-increasing consumer demands. Dr. White serves as the president and CEO of PepperPointe Partnerships, which currently serves more than 90 dental locations and more than 100 doctors.

12:00pm-1:00pm | Lunch Break/Exhibit Hall

Mission Not Impossible: Your Weaknesses are Your Superpowers



Devin

Presented by Corinne Devin, DMD, MS

What if you were told your whole life that your dreams are not possible? Dr. Corinne Devin was able to conquer three dreams (orthodontists, pageantry, naval officer) that she had been told were impossible based on her personal areas of weakness that required her to challenge herself to overcome them. She was able to forge a path that allowed her to tackle several difficult opportunities. From them, she learned how to be a feminine leader in a male-dominated environment. She navigated her career and learned tools that she could bring to each area of her life. Dr. Devin will discuss the hardships and struggles she encountered along the way and how she conquered them.

Learning Objectives:

- Believe in yourself and not in what others tell you that you cannot do.
- Feel empowered that there is nothing you cannot figure out.
- Understand what life as a dentist in the Navy looks like.

Dr. Corinne Devin is a United States Naval Officer and Commander stationed at Marine Corps Air Station Command, Iwakuni, Japan. She was awarded a bachelor's degree in Communications from St. Mary's College and earned a Doctorate of Dental Medicine from the University of Nevada Las Vegas School of Dental Medicine. She completed an Advanced Education General Dentistry at Naval Medical Center San Diego, followed by an operational tour where she deployed in support of Operation Iraqi Freedom to Al Assad, Iraq. She completed her orthodontic residency at Lackland Air Force Base, where she also received a master's degree in Oral Biology from the Uniformed Services University of Health Sciences.

From Bonds to Braces: Pivoting into Private Practice, Prototypes, and Pedagogy



Bonebreak
Jackson

Presented by Chris Bonebreak Jackson, DMD, MS

Dr. Bonebreak Jackson's first professional pivot occurred when she traded her mechanical engineering degree for a career trading bonds on Wall Street. Her second pivot happened five years later, when she was inspired to become an Orthodontist after experiencing the latest technologies at the AAO. She will describe her transition to dental school as a working professional and discuss how she spends her time in three distinct Orthodontic modalities: private practice, research, and instruction in a residency program. Additionally, she will describe the process by which she was awarded a grant from the National Science Foundation to conduct research on 3D metal printed orthodontic systems.

Learning Objectives:

- Outline the path to dental school for non-dental professionals.
- Identify opportunities for non-clinical orthodontic research.
- Evaluate the commitments and responsibilities of part-time faculty in an Orthodontic residency.

Dr. Chris Bonebreak Jackson studied mechanical engineering at MIT, after which she parlayed a poker hobby into a five-year career as a High-Yield Bond Trader for Goldman Sachs. She eventually went on to attend the Harvard School of Dental Medicine and completed her orthodontic residency at the University of North Carolina at Chapel Hill. Today, she is a clinician in private practice, is funded by the National Science Foundation to develop innovative orthodontic systems for her company, SOVE, Inc., and is adjunct faculty at the University of North Carolina-Chapel Hill Adams School of Dentistry. She resides in Chapel Hill, NC with her husband, three daughters, and two pandemic puppies.

3:30pm-4:00pm | Afternoon Refreshment Break/Exhibit Hall

Panel Discussion moderated by Daniel Keith, DDS

Wrap up the day by joining our Saturday speakers for an interactive panel discussion and plan to engage with moderated audience Q&A.

Learning Objectives:

- Evaluate interdisciplinary partnerships and transition model options through the experience of your peers.
- Consider a practice model that suits your short- and long-term professional and personal goals.

7:30am-8:30am | Breakfast

8:30am-9:30am

1.00 CE

How to Recruit and Retain Orthodontic Associations in a Competitive Market



Patterson

Presented by Shannon Patterson, CPR, CMSR, Kolbe Certified Consultant

In the last year we have seen major changes in recruitment for orthodontic associates. Our industry is experiencing constant change and residents have multiple offers in hand as they graduate which means demand is greater than supply. Currently our industry has four generations of orthodontic providers, all of whom have different priorities when it comes to evaluating career and practice opportunities. Today's candidates are much more informed about practice models, so it is vital for potential employers and owners who plan to transition ownership in the near future understand the "one-size-fits-all" practice model is no longer appealing to younger doctors. This lecture will provide recruitment strategies and retention factors whether you're hiring in an urban, suburban or rural setting.

Learning Objectives:

- Evaluate recruitment strategies and retention factors for hiring associates whether you're located in urban, suburban or rural settings.
- Understand the competitive landscape in today's market for hiring and retaining orthodontic associates.
- Differentiate your practice opportunity while recruiting candidates.

Shannon Patterson, a partner with Bentson Copple & Associates, is a recruitment leader in the orthodontic industry, specializing in placement and retention of doctors by engaging in a proactive recruitment strategy. She helps place candidates where they will be a successful fit, not only for the practice, but also the community. She is also a Kolbe Certified™ Consultant and expert in the Kolbe suite of assessments for selection of the ideal candidate match, focusing on strength-based relationships for both doctors. She specializes in comprehensive talent management, candidate sourcing, candidate lead generation and strategic placement planning. Shannon has earned certifications in High Impact Recruiting (CPR) and Certified Medical Staff Recruiting (CMSR) and is a Certified Kolbe Consultant and member of the American Academy of Medical Management (AAMM). Shannon is a frequent lecturer at industry meetings and orthodontic residency programs and contributes to numerous orthodontic journals.

Disclosure: Stock Shareholder (Bentson Copple & Associates)

9:30am-9:55am | Morning Refreshment Break

9:55am-10:00am | Wrap-up Remarks

Presented by J. Kendall Dillehay, DDS, MS, AAO 2021-22 President & DeWayne McCamish, General Chair, DDS, MS

10:00am-11:00am

1.00 CE

Financial Decisions Orthodontists Must Get Right



Wicker

Presented by Dan Wicker, CPA, PFS, RIA

In this lecture, orthodontic practice owners will learn the keys to both business and personal financial success. This lecture will dive into the secrets of knowing, understanding and using key performance indicators to build a high performing, efficient and profitable orthodontic office. The lecture will also teach how to use the profits of your practice to create financial freedom by understanding both tax opportunities and business transition planning.

Learning Objectives:

- Identify and compare your key performance indicators to your peers.
- Properly utilize tax environments to build wealth and lower taxes.
- Implement techniques and a path to maximizing your practice value whether selling to another orthodontist or a DSO.

Dan Wicker is the managing partner of Cain, Watters & Associates (CWA) in Plano, TX. CWA has helped dental professionals maximize their earning potential and practice value since 1982. Dan manages the CWA financial advisors, in addition to regularly speaking at both local and national dental events.

Disclosure: Stock Shareholder (Cain, Watters & Associates, LLC)

Financial Outcomes with Models



Kucharo

Presented by Brad Kucharo, CPA, CFP

Regardless of your orthodontic practice model, there are several common elements that ensure a profitable outcome. Find out what shared traits separate the average practice from the excellent. Learn which metrics have the biggest financial impact on your bottom line and the fiscal significance of having the right team (employees, consultants, and advisors). This course also covers the economic calculations critical for making any DSO transition decision.

Learning Objectives:

- Identify the essential metrics for success.
- Economically evaluate whether to sell to a DSO.

Brad Kucharo is a tax and business planning advisor for John K. McGill & Company, specializing in helping dentists and specialists nationwide. He graduated from the University of Iowa and holds both a Bachelor of Business Administration degree and Master of Accountancy degree. Brad obtained his Certified Public Accountant certificate in 2007 and his Certified Financial Planner™ certificate in 2008. He formerly worked at PricewaterhouseCoopers, LLP in the Personal Financial Services Group performing tax and financial planning services for high net-worth individuals.

Disclosure: Consultant (John K. McGill & Company, Inc)

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