

2006 SEATTLE STUDY CLUB NATIONAL SYMPOSIUM

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*In Search of Sanctuary*  
CREATING PRACTICE AND PERSONAL WEALTH

JANUARY 24 ~ JANUARY 28, 2006

FOUR SEASONS RESORT, AVIARA



As clinicians, we cherish the moments when our technical expertise truly makes a difference in someone's life. Nothing is more satisfying than relieving patients of pain, restoring the natural beauty and function of their dentition, and improving their quality of life. Thus, it is only natural that we often measure our worth in terms of "doing good" instead of "doing well."

Certainly, financial prosperity is not the only yardstick by which to gauge success in life. Though to prosper both personally and professionally, we must work as purposefully for fiscal stability as we do for clinical excellence.

Many in our field would have us believe that a few practice management courses are sufficient to ensure long-term financial well-being. However, this perspective does not begin to address the diversity of factors that affects business performance. For instance:

1. Have you analyzed the competitive landscape in your area and developed a plan to capitalize on opportunities and counter threats to your practice?
2. Are you challenged with attracting and retaining qualified staff?
3. Do you understand the difference between true leadership vs. mere day-to-day management of your practice?
4. Would you like to grow your business, but are unsure how to create and execute an effective marketing plan?
5. Have you developed a viable exit strategy?

At the 2006 Seattle Study Club National Symposium, you will find solutions for these and many other issues critical to the long-term success of your practice. This year we are making available to you some of the leading business authorities in the country. They are corporate leaders, management consultants and financial experts, who come to the table with a singular purpose: to help you become a successful "CEO" of your practice by providing you with the knowledge to operate your business with confidence and direction.

Set amidst the serenity of the Batiquitos Lagoon, one of the few remaining tidal wetland preserves in Southern California, the 2006 Symposium offers you the opportunity to create a refuge of your own for managing, protecting and fostering the growth of your business. We hope you can join us at this one-of-a-kind event.

A handwritten signature in dark ink, appearing to read "Michael Cohen".

Michael Cohen, DDS, MSD

*Symposium  
2006*

# Overview

## Tuesday

### **STRATEGIC PLANNING AS CEO: UNDERSTANDING THE COMPETITIVE ENVIRONMENT**

In the natural world, only the strongest and most adaptable species survive. In the business world, the same principle holds true. On Tuesday, you'll analyze the strengths, weaknesses, opportunities and threats to your practice, and discover how to capitalize on your strengths and overcome your challenges. Experts in strategic business planning and marketing will arm you with sophisticated survival skills needed to succeed in an increasingly competitive environment.

## Wednesday

### **BECOMING YOUR OWN CEO**

As CEO of your practice, you are a care provider in more than one sense. Not only do patients depend on your expertise, but your staff looks to you for leadership as well. Wednesday focuses on the human aspects of your business, including strategies for training, compensating and retaining a quality team. You'll learn important facets of employment law, the value of staff development and the secret to choosing the right people.

## Friday

### **THE CEO'S GUIDE TO FINANCIAL WELL-BEING**

If your practice is one of your most prized possessions, protecting it is likely your highest priority. On Friday, renowned finance professionals will advise you in understanding and developing a solid financial plan for your business. Topics will include cash flow management, profitability analysis, techniques for forecasting future performance and fraud prevention tactics.

## Saturday

### **TRANSITIONING YOUR PRACTICE AS CEO**

Many of us invest so much time and energy into building and growing our practice that we give little thought to transitioning out of it. Indeed, that day will come for all of us, and a little planning can yield bountiful results. Saturday will focus on exit strategies and wealth accumulation, including practice transitions, partnerships, IRAs and retirement accounts, estate planning and long-term financial security.

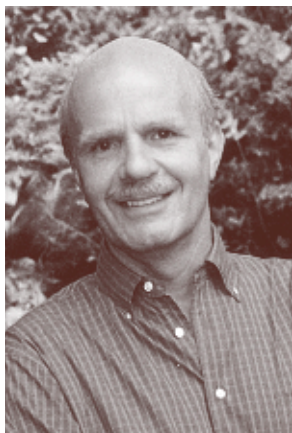
# Faculty

LEIGH BRANHAM  
JAMES CATHCART  
DARRELL CAIN  
DEAN DESROSIERS  
WAYNE DYER  
JEFF DZIAK  
BEN GRIFFIN  
OREN HARARI  
JACK HIGGINS  
BARBARA LEHMAN  
ROGER LEVIN  
DON LEWIS  
SCOTT MCKAIN  
MATT PALADINI  
BRENDA PENWELL  
DEBRA PHAIRAS  
ANGELA PICKETT  
JIM PIRAK  
HOWARD ROCHESTIE  
MICHAEL SCHUSTER  
DAVID SCHWAB  
MIKE SCOTT  
MICHAEL SMITH  
ROBERT STUTMAN  
DAN TRIPPS  
TIM TWIGG  
PAT WILLIAMS

# Keynote Speakers

WAYNE DYER

## THE POWER OF INTENTION



Intention is generally viewed as a pit-bull kind of determination propelling one to succeed at all costs by never giving up on an inner picture. With this view, an attitude that combines hard work with an indefatigable drive toward excellence is the way to succeed. In this presentation, however, Wayne Dyer will discuss intention as a force in the universe that allows the act of creation to take place. He explores intention not as something you do, but as a field of energy that you can access to tap the power of your highest self.

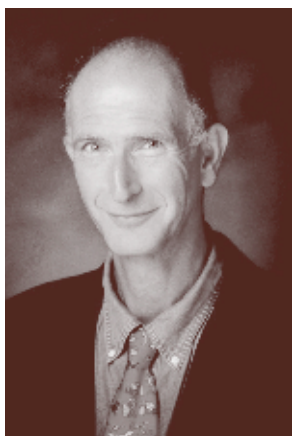
Wayne Dyer is one of the most widely read authors in the field of self-development. He has taught at many levels of education, from high school to the teaching hospital of the Cornell University Medical College. Dyer has written three bestsellers and co-authored textbooks and professional journal articles. He is a renowned social commentator and has appeared on *The Today Show*, *The Tonight Show*, *The Phil Donohue Show* and *Oprah Winfrey*. Dyer received his PhD in counseling psychology from Wayne State University and the University of Michigan.

### Objectives

- ❖ Transcend your past conditioning and let a new you shine through.
- ❖ Nurture trust in yourself and in the essence of your being.
- ❖ Invite divine desire to express itself through you.
- ❖ Cultivate an attitude of gratitude.
- ❖ Develop a greater sense of oneness with nature and your environment.
- ❖ Achieve the perfect state of awareness by freeing yourself from the constraints of the ego.

OREN HARARI

## HOW TO BUILD YOUR BUSINESS FOR COMPETITIVE SUCCESS



In today's "copycat economy," dentists recognize that their products and services are becoming imitated and commoditized at an accelerating pace, thus depressing margins, customer loyalty, cash flow and market differentiation. This presentation will describe how small businesses should position themselves to break away from competitors and overcome those challenges in order to maintain competitive success.

Oren Harari, Professor of Management at the Graduate School of Business, University of San Francisco, shares provocative new perspectives on competitive advantage, organizational change and transformational leadership. As a leading management consultant and best-selling author, Harari brings more than 20 years of seasoned professional experience to the public speaking forum. In his seven books, Harari describes the strategic decisions and leadership behaviors that propel organizations into successful positions of competitive advantage. He has spoken to premier organizations worldwide, such as Microsoft, Merck, Citigroup, Texaco, Toyota, Wal-Mart and General Mills. Harari received his PhD from the University of California, Berkeley.

### Objectives

- ❖ Understand how to provide breakthrough customer experiences.
- ❖ Learn how to brand your business.
- ❖ Discover how to mobilize your people to help you accomplish these extraordinary goals.
- ❖ Find out how to continually rethink and improve your approach to your business.

SCOTT MCKAIN

## THE LEADERSHIP DYNAMIC: MOVING FROM SUCCESS TO SIGNIFICANCE



Leadership is more than ownership. Many professionals have attained success, but significance is a higher standard achieved only by those who exert true leadership instead of mere management. In this presentation, you will examine the most compelling aspects of leadership through an analysis of what top corporate executives have done to take their organizations to the next level. Based on the speaker's recent research and information from his books, *ALL Business is Show Business* and *What Customers REALLY Want*, you will explore the leadership philosophy that he and his partners exercised to acquire 14 companies and greatly enhance their profitability.

Scott McKain is Vice Chairman of Obsidian Enterprises, Inc., a publicly traded holding company that invests in small- and mid-cap companies in basic industries such as manufacturing and transportation. Obsidian was recently named one of the “fastest growing public companies” in the nation. In addition to growing successful businesses and developing corporate leaders within his own \$100 million-plus organization, McKain also created and serves as Chairman of the Value Added Institute, a think tank that explores the activities organizations must execute to enhance customer loyalty. He is a published author and has appeared on numerous national, regional and local newscasts.

### *Objectives*

- ❖ Understand the importance of precision of vision, and why the goal of “growing my business” won’t do it.
- ❖ Identify the value of high concept – how to communicate your precise vision in a manner that emphasizes your leadership and creates attention from your followers.
- ❖ Learn the power of story and how leaders move their communication from effective to persuasive.
- ❖ Examine the six main lessons of visionary CEOs: What Welch, Nardilli, Kelleher and others really teach us.
- ❖ Create a continuous compelling advantage by understanding how leadership differentiates you from those who merely “manage” or “own.”

PAT WILLIAMS

## THE MAGIC OF TEAMWORK



As his 1983 World Championship confirms, Pat Williams is a master at building successful teams. Based on what he has learned from his experience in building sports teams for over 40 years, Williams offers proven principles for fostering a winning team in your business. After implementing the techniques presented in this session, you can expect your team to produce better results while working more cohesively.

Pat Williams is the Senior Vice President and Co-founder of the Orlando Magic, the National Basketball Association (NBA) franchise in Orlando, FL. Williams is widely recognized throughout the sports world as a consummate promoter and astute talent scout. Many also consider him to be one of this country's premier motivational and humorous speakers. Williams has addressed employees from most of the *Fortune 500* companies and the Million Dollar Round Table, and he has authored 38 books. He earned a PhD in human letters from Flagler University and a Master of Science degree in physical education from Indiana University.

### *Objectives*

- ❖ Learn how to acquire top talent.
- ❖ Understand the importance of commitment and passion in your business.
- ❖ Discover the value in putting the team first.
- ❖ Realize why you should empower individuals so they can be successful.
- ❖ Uncover strategies for building respect and trust, which leads to loyalty.

# Tuesday

## STRATEGIC PLANNING AS CEO: UNDERSTANDING THE COMPETITIVE ENVIRONMENT

ROGER LEVIN

### COMPETING FOR THE FUTURE



Dentistry has changed. The days are gone when doctors can simply open their doors and be successful. Today, top-level professionals are designing programs that give their practices a competitive advantage with regard to attracting patients, quality of care and long-term success. In this presentation, you will get specific insights as to the competitive landscape in dentistry today, learn how to practice ethically in the face of changing competition, and find out how quality, communication and patient relations can have a major impact on the short- and long-term success of your practice.

Roger Levin, DDS, MBA, is Founder and Chief Executive Officer of Levin Group, a leading dental practice management consulting firm. For 20 years, the primary goal of Levin Group has been to bring the business world to dentistry, training more than 650 doctors each year on how to manage their practices efficiently and profitably. Levin is a renowned speaker and author, and has published more than 2,700 articles and 49 books. He also currently serves as the Practice Management Editor of six leading dental journals, as well as being a columnist for the *Journal of the American Dental Association*.

### Objectives

- ❖ Get specific insights as to the competitive landscape in dentistry today.
- ❖ Take away several strategies relevant to every practice to help improve the lives of dentists.
- ❖ Learn how to evaluate your business and be motivated to build a great practice.
- ❖ Focus on taking your practice to the next level.

BEN GRIFFIN

### STRATEGIC THINKING FOR THE CEO DENTIST



Since you probably don't have several MBA graduates on staff at your office, and you spend your time taking care of patients, you probably don't make the time to think strategically about your practice. The time-consuming, expensive, corporate approach to strategic planning is not an option. You need a shortcut way to get into strategic territory that is consistent with the realities of your professional practice. In this high-speed presentation, you'll have the chance to think strategically in your role as CEO of your practice.

Ben Griffin is the Founder of PerformanceCatalyst<sup>sm</sup> and has more than 35 years of experience as a corporate executive and entrepreneur. Griffin has extensive experience designing, developing and marketing new products in a variety of business environments and has developed and implemented national sales and marketing campaigns. He is a skilled team-builder, responsible for recruiting, training and motivating senior management and professionals at all organization levels. Griffin received his MBA from Rollins College in Winter Park, FL.

### Objectives

- ❖ Understand the tools, ideas and techniques to foster strategic thinking about your practice.
- ❖ Come away with a workbook you can use for long-term consideration about how to position your practice to grow and accomplish your vision, professionally and personally.
- ❖ Reconnect with why you are doing this in the first place, and work on your role as CEO of your practice by thinking strategically.

## BARBARA LEHMAN



Barbara Bellman Lehman is an entrepreneur, businesswoman, author, lecturer, consultant and marketing coach, with a focus on developing integrated communication strategies for clients in the healthcare industry. With more than 30 years in strategic marketing, her skills in brand management have helped clients be more competitive. Lehman is a contributor to major national marketing publications and has authored two books. Lehman holds a Bachelor of Science degree in business administration from Arizona State University with an emphasis in marketing and advertising.

### THREE THINGS NO CEO CAN EVER DELEGATE [DOCTOR LECTURE]

Your journey to become educated, get your training, establish your practice, cultivate your patients, secure your reputation and create your financial well-being is all contingent on three things: your goals, your business acumen and your reputation. Within these areas is a wealth of activity and thinking that influences the outcome, for better or worse. In this session, you will understand why there are some areas of your practice that just can't be delegated, and why you have to retain a strong voice in each of them.

#### *Objectives*

- ❖ Understand the difference between positioning, visibility and reputation management.
- ❖ Learn to craft your story in such a way that it is believable, attainable and consistent.
- ❖ Clarify what gets delegated, implemented and supervised so that your reputation is secure.
- ❖ Establish appropriate goals and budgets to reach your objectives.

### THREE THINGS EVERY PROFESSIONAL'S SPOUSE SHOULD KNOW [SPOUSE LECTURE]

Every dental professional's spouse faces pressures and challenges throughout the life cycle of the practice. It begins with the "building the career" phase, continues through the "protecting the turf" phase, and moves on to the "preserving a quality of life" phase. At each point, the spouse plays a significant role. In this session, you will understand how to wield your influence effectively in the practice, in the community and at home so that your partnership with your spouse is truly a joint venture.

#### *Objectives*

- ❖ Understand the appropriate role to play in your spouse's professional practice.
- ❖ Recognize what marketing support can be reasonably provided from the sidelines vs. on the court.
- ❖ Learn how to support the professional at home without losing yourself to the business.
- ❖ Leverage your personal assets to assist in the professional positioning of the practice.



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ANGELA PICKETT AND ROGER LEVIN

## IS MARKETING AN OPTION OR A NECESSITY?



Marketing is no longer an area any practice can afford to ignore. Unlike in the past, dental practice marketing today has become scientific in its nature and uses data-driven strategies and concepts to guide the future of practices. Professionals who understand and implement ethical marketing programs can rise to the next level of success with increased referrals, new patients and expanded services. This practical presentation, based on 20 years of data accumulation, will explore specific strategies and marketing plans that dental practices can put into action immediately.

Angela Pickett, RDH, MAS, is Vice President of Consulting for Levin Group, one of the nation's leading dental practice consulting firms. In this role, Pickett is responsible for developing new practice building programs, identifying new business opportunities, providing leadership, training and ongoing support to Levin Group consultants, and providing all Levin Group clients with unparalleled customer service. Pickett earned her Master of Administrative Science degree with a concentration in management from Johns Hopkins University and her Bachelor of Science degree in dental hygiene from the University of Maryland at Baltimore. [See *Roger Levin biography* on page 6.]

### *Objectives*

- ❖ Learn specific marketing strategies and action plans you can implement in your practice immediately.
- ❖ Understand the dramatic impacts of effective marketing on your level of success, referrals, new patients and expansion of services.
- ❖ Take away information based on 20 years of best practices from successful dental marketing programs.

DAVID SCHWAB

## INCREASING PROFITABILITY THROUGH EFFECTIVE TEAM UTILIZATION



Developing and maintaining a profitable practice is everyone's responsibility. It is critical that your team members learn how to control costs, increase case acceptance and work smarter not harder so that everyone's talents are used to their fullest. This presentation will discuss matching the person to the task, outsourcing, computer use and patient "show and tell" to educate patients on the benefits of needed treatment. Since a rising tide raises all boats, learn specific strategies for increasing profitability so that you can maximize staff compensation and create a more engaging and satisfying work environment.

David Schwab presents practical, user-friendly seminars for the entire dental team. An internationally known seminar speaker and practice management consultant who works exclusively with dental professionals, Schwab has previously served as Director of Marketing for the American Dental Association and Executive Director of the American College of Prosthodontists. His marketing consulting firm, David Schwab & Associates, Inc., provides seminars and practice management services for fee-for-service dentists in the United States and Canada, and his articles have appeared in numerous publications. Schwab holds a PhD in English from Northwestern University.

### *Objectives*

- ❖ Learn how to create a leading-edge practice while controlling costs.
- ❖ Discover tactics for presenting treatment options to patients in an educational format that leads to increased case acceptance.
- ❖ Match the person to the task to achieve increased productivity.
- ❖ Take full advantage of outsourcing so team members can focus on what they do best.
- ❖ Make everyone accountable and create a more satisfying work environment.

JEFF DZIAK

## BACK TO BASICS: LEGENDARY SERVICE, RITZ-CARLTON STYLE



Find out how employee engagement leads to customer engagement and profits by following the Ritz-Carlton philosophy. This presentation will describe the Ritz-Carlton Gold Standards, which include the Credo, the Motto, the 3 Steps of Service, the 20 Basics and the Employee Promise. Explore successful business practices, such as creating memorable guest experiences and “wow” stories, employee selection, orientation, training, empowerment and daily lineup.

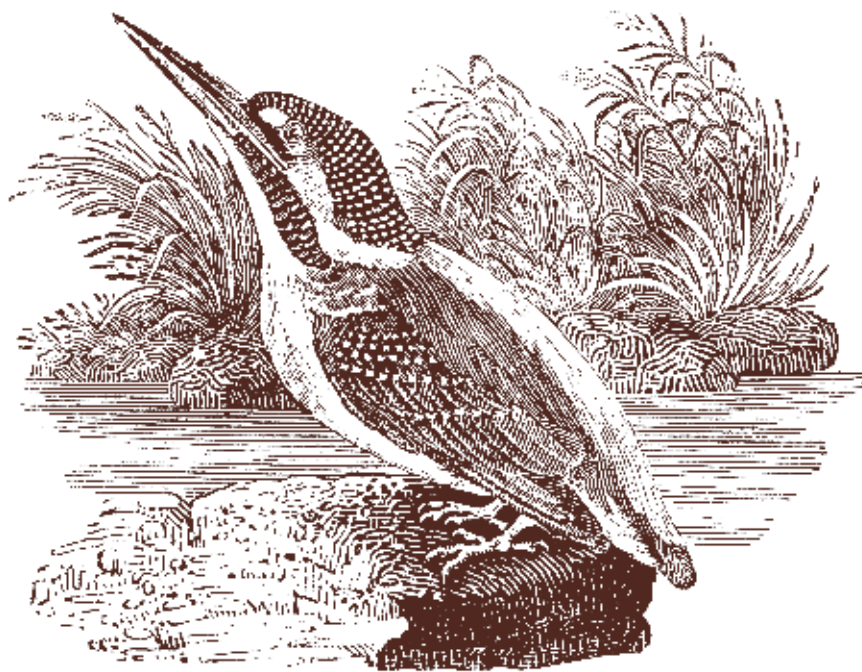
Jeff Dziak is the Executive Assistant Manager, Food & Beverage, for the Ritz-Carlton Hotel in Phoenix, AZ. Since arriving in Phoenix in April of 2002, Dziak has led a renaissance of the property, which has resulted in three years of positive financial results and the title “The Best Company to Work for in Arizona, 2004.” Dziak has also been an opening trainer for the Ritz-Carlton properties in Dubai, Half-Moon Bay, and Orlando, and he has participated in two Malcolm Baldrige preparations and awards.

### *Objectives*

- ❖ Understand the Ritz-Carlton philosophy.
- ❖ Review the Ritz-Carlton’s business management model and key success factors.
- ❖ Explore strategies for hiring and training top talent.
- ❖ Learn how to ensure customer loyalty through customer service excellence.

### *The Sanctuary Café*

Tuesday evening we bring you one of the Bay Area’s most dynamic and popular contemporary jazz artists – Joyce Cooling. This songwriter/musician and her band have created a cohesive blend of guitar, keyboards, vocals and percussion, bringing a fresh new spin to contemporary jazz.



*kingfisher*

JACK HIGGINS

### HIRING TOP TALENT



The fewer employees you have, the greater the negative impact of a poor hiring decision on your patients and your staff. In short, small entrepreneurial enterprises cannot afford to make hiring mistakes. In this presentation, you will learn how to write an effective performance profile, target qualified candidates, ask the right interview questions and persuasively present a job offer to your chosen candidate.

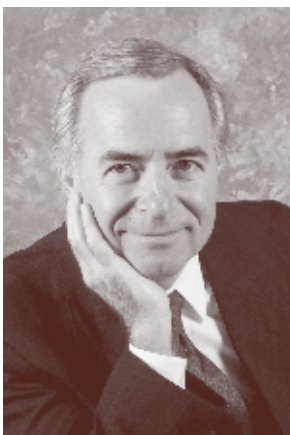
Jack Higgins is Vice President of Human Resources for the three manufacturing divisions of Argo-Tech Corporation in Costa Mesa, CA. His key objective is to guide and direct the recruiting efforts for all executive, professional and technical hiring. In addition, Higgins designs and delivers all management training and individual executive and management coaching. Prior to this, Higgins was the Principal of JMH Consulting, a leadership and management consulting practice specializing in coaching executives and managers who desire to improve their business practices. He earned his Master's degree from Ohio University, Athens, OH, and a Bachelor's degree from Loras College, Dubuque, IA.

### *Objectives*

- ❖ Understand that a carefully written performance profile is critical to successful hiring.
- ❖ Learn the four basic questions and one skill that will enable you to find out if candidates have the ability, talent, energy and motivation to succeed in the position.
- ❖ Explore ways to target top talent and encourage qualified candidates to apply.
- ❖ Discover one simple technique for making a job offer to your chosen candidate that will produce a positive outcome.

MIKE SCOTT

### TEAM MANAGEMENT: DEVELOPING AND UTILIZING SKILLS TO THEIR MAXIMUM POTENTIAL AND BRINGING OUT MAXIMUM CREATIVITY



Managing a group of people can be as difficult as herding cats or as easy as operating a finely tuned machine. It is always your choice. This presentation will give you four of the most effective and unique ideas for managing your team. Learn how to fully utilize each employee's skills and bring out their maximum creativity. These strategies are designed to inspire employees to give their best every day.

Mike Scott believes that any time invested in training must provide information that has immediate and applicable take-home value. He started his own training and development company in 1984 and regularly speaks, designs and conducts training programs for both large and small companies, including McDonalds Corporation, Ernst & Young, AAA, and many others. He previously served as Manager of Recruiting and Training for Reed Tool Company in Houston, TX, and Human Resources Manager for the Energy Banking group of RepublicBank, now Bank of America. Scott earned his Bachelor of Science degree in business and his Master of Arts degree in psychology from North Dakota State University.

### *Objectives*

- ❖ Find out how to make sure nothing falls through the cracks.
- ❖ Learn how to interact and engage in complete communication.
- ❖ Adopt effective strategies for resolving conflicts.

LEIGH BRANHAM

## THE SEVEN HIDDEN REASONS EMPLOYEES DISENGAGE AND LEAVE



Surveys of managers reveal that more than 85 percent believe employees leave for “pull” reasons, such as more pay or better opportunity. Yet, when objective third parties ask employees what caused them to think about leaving in the first place, more than 80 percent cite “push” factors related to management practices or dysfunctional cultures. This gaping disconnect between belief and reality prevents organizations from addressing the problems of employee disengagement and turnover with on-target solutions. This presentation will deliver practical ideas and best practices that organizations can use to fight the root causes of turnover.

Leigh Branham, SPHR, is Founder and Principal of Keeping the People, Inc., Overland Park, KS, a talent management consulting firm. In cooperation with the Saratoga Institute, Branham wrote *The 7 Hidden Reasons Employees Leave: How to Recognize the Subtle Signs and Act Before It's Too Late* (AMACOM Books, 2005).

Branham has 25 years of experience in human resource consulting and speaks frequently on the topics of employee engagement and retention.

### *Objectives*

- ❖ Deepen your understanding of the root causes of employee disengagement and turnover.
- ❖ Explore a broad range of employee engagement best practices.
- ❖ Take away tools and techniques that will help you implement best practices to engage and retain key talent.
- ❖ Learn how to create action plans to better engage and retain key talent.

MATT PALADINI

## COMPENSATION STRATEGIES



“What benefits do you offer?” It’s a question almost every job candidate will ask. Are you, as the CEO of your business, prepared to answer? This presentation will enable you to discuss meaningfully the employee benefits of the practice with your current and prospective staff, including pension plans, insurance, continuing education and more. You will review the individual features and value of each benefit and learn to incorporate this information into your new hire and staff compensation reviews by presenting the total compensation package.

Matt Paladini is a Certified Financial Planner and Certified Investment Management Analyst at Cain Watters & Associates. He is also a Registered Investment Advisor with the Securities and Exchange Commission. Paladini currently provides services to working and retired dentists, including investment management, charitable planning, tax strategy planning, retirement forecasting, insurance planning,

practice evaluation and cash flow planning. Paladini received his Bachelor of Business Administration degree in finance from the University of North Texas.

### *Objectives*

- ❖ Understand how to discuss employee benefits such as pension plans, health and dental insurance programs, and Section 125 (Cafeteria) plans.
- ❖ Review the options for offering vacation time, holidays and personal time.
- ❖ Learn the value of continuing education and career development benefits.
- ❖ Take away a format for reviewing the total compensation package with your employees during their annual evaluation.

DEBRA PHAIRAS

## PRACTICAL AND PROFICIENT PERFORMANCE EVALUATIONS FOR EMPLOYEES



Every business, including dentistry, needs to learn practical and proficient personnel management skills and techniques. This information-packed workshop will teach you how to coach and evaluate your employees for continued and enhanced practice success while avoiding litigation from labor law problems. You will learn from real-world case studies and explore practice examples and forms.

Debra Phairas is President and Founder of Practice & Liability Consultants in San Francisco, CA, a nationally recognized healthcare practice management and risk management consulting and seminar firm. Her clients include over 900 individual and group practice physicians of every specialty, malpractice insurance companies and state, local and national medical and dental associations. Phairas received her MBA in health services administration from Golden Gate University and her Bachelor of Science degree in health education from Michigan State University.

### *Objectives*

- ❖ Understand the elements and tools integral to an effective job performance evaluation.
- ❖ Compare merit reviews for performance raises vs. cost-of-living raises.
- ❖ Explore the value of rating scales and how to use them.
- ❖ Find out about “The Feedback Sandwich” and how to give constructive criticism in a positive manner.
- ❖ Recognize the need for documentation via the performance evaluation to avoid liability and wrongful termination.

TIM TWIGG

## EMPLOYMENT LAW COMPLIANCE FOR DENTISTS: SOLUTIONS TO COMMON PERSONNEL PROBLEMS



Human resource management, including the variety of state and federal labor regulations, is not offered in the curriculum of dental schools. As a result, doctors often find themselves in court regarding employment issues. Such lawsuits can be emotionally draining and financially devastating. In this presentation, you will learn how to apply proven, professional personnel management techniques to many common personnel problems. Discover how to take some of the risk out of being an employer and ensure employment law compliance.

As the Owner and President of Bent Ericksen & Associates and CRC, Inc., Tim Twigg brings over 25 years of practice management and business consulting experience and knowledge specifically in the healthcare field. Twigg is a published author of articles for many major healthcare journals and currently co-authors a monthly column in *Dental Economics*. He has presented seminars nationally on the topics of practice management, human resources and employment law compliance.

### *Objectives*

- ❖ Identify your degree of personal and professional exposure.
- ❖ Find out how to ensure compliance with state and federal employment regulations.
- ❖ Review the top 10 human resources mistakes and how to prevent them.
- ❖ Learn five keys to preventing lawsuits.
- ❖ Understand how to reduce the high cost of turnover.
- ❖ Explore ways to properly handle terminations, maternity leave, seminar pay, reference checking and recordkeeping.

## DEAN DESROSIERS

### LEADERSHIP IN LIFE, DENTISTRY AND BUSINESS



Examine the world of team leadership, motivation and business planning. This presentation will explore the issues and unique challenges that face today's dental team and provide practical and insightful solutions. You will learn the startling paradox of leadership in dentistry and uncover why the traits and habits that make a great dentist do not necessarily make a great leader. Also, discover helpful and easy-to-use business planning methods to identify problem areas, create a business plan for growth and build a sense of teamwork.

Dean Desrosiers has worked closely with many of North America's top performing dental practices in the areas of practice development, marketing and training. He has 14 years of experience in marketing and business development, most recently as Director of Marketing for Nobel Biocare Canada. A frequent author and lecturer, Desrosiers brings research, knowledge of dentistry and business experience to his presentations on marketing and business strategy. He graduated from the University of British Columbia.

#### *Objectives*

- ❖ Discover what type of team member you are.
- ❖ Learn to avoid the most common leadership mistakes.
- ❖ Find out what motivates your team.

## ROBERT STUTMAN

### WE DON'T KNOW WHAT WE DON'T KNOW: DRUGS, OUR KIDS, OUR NEIGHBORHOOD AND OUR WORKPLACE



We all think we know all there is to know about drugs. But do you realize that the United States, with just 5 percent of the world's population, consumes over 50 percent of the world's drugs? When these drugs reach the workplace they present problems such as accidents, pilferage and lawsuits resulting in punitive damage awards. Many companies think they are dealing with the issue, only to discover they are making mistakes in office policy that cost money and offer no defense against substance abuse at work. This presentation bares the reality of how substance abuse affects your family, community and workplace.

Robert Stutman, formerly "the most famous narc in America" (*New York Magazine*), is an "S. O. B. on the side of the angels" (*Boston Herald Magazine*) and "one of our nation's heroes" (Dan Rather, CBS News). Taking to the front lines of the drug wars, Stutman made a 25-year career as one of America's highest-profile drug busters. He was a Drug Enforcement Administration (DEA) agent so visible the Columbian Cartel had at one time targeted him for assassination.

#### *Objectives*

- ❖ Review how we have become a nation of drug users with an average starting age of 12, and what we can do about it.
- ❖ Understand how white-collar businesses like dental practices can go bankrupt because of the abuse of alcohol and drugs when we least suspect it.

### *Welcome Reception on the U.S.S. Midway*

Christened in 1945, the *U.S.S. Midway* was the largest ship in the world for 10 years, and the first ship that was too big to go through the Panama Canal. During its 47-year career, the ship served both military and humanitarian purposes. As their record of accomplishments grew, the ship and the men who served on her were honored with the name "Midway Magic." Our evening aboard the *Midway* will have a 1940s theme (think "Boogie Woogie Bugle Boy" and Betty Grable), but those who choose not to dance to the Big Band can try the flight simulators, check out the amazing vintage and modern planes on the flight deck, or just enjoy the 360-degree view of the San Diego skyline. During this fun and fascinating evening, we plan to make a little Midway Magic ourselves!



*great  
egret*

# Thursday

## OPTIONAL PROGRAMS

JAMES CATHCART

### FOCUS: ACHIEVING YOUR HIGHEST PRIORITIES



The FOCUS: Achieving Your Highest Priorities workshop is the anchor of the Franklin Covey Focus Solution. This session teaches productivity skills integrated with a powerful planning system that helps individuals clarify, focus on and execute their highest priorities, both personally and professionally. You will understand how to establish a goal-setting process to help you become more focused and receive technology tips and best practices to help you manage the onslaught of information you receive daily. This program is included in the Coordinator~Staff~Spouse Program on Friday and is an option for participants in the Doctor Program on Thursday. It is not available to individuals registered only for the Social Program. [Full description on page 18.]

ROBERT STUTMAN

### WE DON'T KNOW WHAT WE DON'T KNOW: DRUGS, OUR KIDS, OUR NEIGHBORHOOD AND OUR WORKPLACE



We all think we know all there is to know about drugs. But do you realize that the United States, with just 5 percent of the world's population, consumes over 50 percent of the world's drugs? When these drugs reach the workplace they present problems such as accidents, pilferage and lawsuits resulting in punitive damage awards. Many companies think they are dealing with the issue, only to discover they are making mistakes in corporate policy that cost money and offer no defense against substance abuse at work. This presentation bares the reality of how substance abuse affects your family, community and workplace in the 21<sup>st</sup> century. This program is included in the Coordinator~Staff~Spouse Program on Wednesday and is an option for participants in the Doctor Program on Thursday. It is not available to individuals registered only for the Social Program. [Full description on page 13.]

DON LEWIS

### THEFT, FRAUD AND EMBEZZLEMENT IN THE DENTAL OFFICE



Doctor, your check has bounced again. Attacking dental practices with a variety of different scams and schemes, white-collar criminals are stealing from dentists each and every day. In fact, one out of four dentists is or has been a victim of embezzlement. Are you next? In this session you will receive a take-home, proven, internal control system to safeguard your assets. Designed and developed specifically for dentists, this presentation will empower you with the knowledge you need to reduce the risk of becoming a victim. This program is an option for participants in the Doctor Program only. [Full description on page 18.]

## *Awards Theater & Peking Acrobats*

The Awards Theater has become a new tradition to acknowledge our study clubs of distinction. Don't be late – you may hear your own club name called! The awards will be followed by the magical, theatrical and spectacular Peking Acrobats. Hailing from the People's Republic of China, this elite group of gymnasts, jugglers, cyclists and tumblers will leave you spellbound by the graceful athleticism of their ancient folk art.



# Friday

## THE CEO'S GUIDE TO FINANCIAL WELL-BEING

MICHAEL SMITH

### THE DIRTY DOZEN: 12 FINANCIAL PLANNING ERRORS



Dentists are not exempt from the most common financial planning mistakes and are possibly more prone to making them than some other professionals. Research indicates that less than 5 percent of dentists can retire at age 60 and continue to enjoy their current lifestyle. It is critical to understand your financial situation and take control of it. This presentation will explore 12 common financial planning mistakes and ways to avoid or correct them. Discover how to reach financial independence on your terms – so you can work because it is your passion rather than because you are financially obligated to do so.

Michael Smith, CFP, MBA, CFA Level 2 Candidate, has more than a decade of financial planning and wealth management experience with leading institutions. He is currently Vice President of Levin Financial Services, Inc. – a company that helps dentists create a financial roadmap through financial planning and asset management in order to achieve financial independence. Previously, Smith served as a Manager of the Financial Planning Department and a Senior Financial Planner at Legg Mason, where he successfully managed multimillion dollar relationships for corporations and individuals.

#### *Objectives*

- ❖ Take away ideas that can be implemented in your financial life in seven days.
- ❖ Understand the importance of comprehensive financial planning.
- ❖ Find out the most common mistakes made by dentists in relation to financial planning.
- ❖ Realize that no matter where you are in your life cycle, financial planning is important and should be started now.

BRENDA PENWELL

### MAKING SENSE OF FINANCIAL STATEMENTS



From golf scores to cholesterol to the stock market, numbers are everywhere. Whether you love them or hate them, numbers are the way we keep track of things. When numbers are put together in the right ways, and in different ways, they paint detailed pictures of the health of your business. This session provides a look at financial statements and the eight action steps that even “figure-phobic” individuals can use to analyze their businesses.

Brenda Penwell joined the Schuster Center for Professional Development 20 years ago (she is currently President and Financial Officer). She is on the faculty for both the Management and Advanced Development Programs and is intricately involved in curriculum development. As a member of the Schuster Center faculty, Penwell has the opportunity to work closely with dentists and their teams, assisting them in achieving their professional and personal goals.

She holds a Bachelor of Science degree in business administration.

#### *Objectives*

- ❖ Explore the “what” and “why” of financial leadership.
- ❖ Review financial planning as a management function.
- ❖ Reveal what financial statements can tell you about your business.
- ❖ Understand the concept of financial ratios.
- ❖ Learn why cash is the king of all assets.

## MICHAEL SCHUSTER



Michael Schuster, DDS, is the Director of the Schuster Center. He founded the Schuster Center in 1978 to teach concepts of personal growth, managerial excellence and economic freedom. The information developed and pioneered by Dr. Schuster is at the leading edge of practice development and fiscal success in the world today. He is the developer of the Dental Fitness Program and the creator of the Profit-Ability Management Method. Schuster is a published author and has lectured at every major dental meeting in the United States and Canada.

## THE BOTTOM LINE

From an economic standpoint, profit is the bottom line. In this presentation, you will learn the eight principles of economic freedom, strategies for practice and personal fiscal control, payables and receivables management, fee setting and the power account. In addition, you will receive a practical spreadsheet tool for budgeting that you can use in your practice.

### *Objectives*

- ❖ Understand the four critical steps to controlling money.
- ❖ Research the model for spending.
- ❖ Find the hidden profit in your practice.
- ❖ Learn what excess overhead costs.
- ❖ Explore the five driving forces in every dental practice.

## CASH FLOW

Discover a simple strategy for learning how to control and predict cash flow simply and precisely. This session will present a spreadsheet called Breakeven Analysis, which will enable you to know the exact amount of cash intake required each day, week, month and quarter so that you are in total control of cash flow in your practice. Also, get a quick and easy calculation of wealth accumulation with the Personal Spending Spreadsheet and the Wealth Test.

### *Objectives*

- ❖ Discover the laws of money.
- ❖ Learn the symptoms of poor money management and what to do about them.
- ❖ Manage effectively for healthy accounts receivable.
- ❖ Find money to invest.



*wren*

DON LEWIS

## THEFT, FRAUD AND EMBEZZLEMENT IN THE DENTAL OFFICE



Doctor, your check has bounced again. Attacking dental practices with a variety of different scams and schemes, white-collar criminals are stealing from dentists each and every day. In fact, one out of four dentists is or has been a victim of embezzlement. Are you next? In this session you will receive a take-home, proven, internal control system to safeguard your assets. Designed and developed specifically for dentists, this presentation will empower you with the knowledge you need to reduce the risk of becoming a victim.

After many years in private practice, Donald Lewis, Jr., DDS, CFE, realized that he was a victim of a very silent and financially draining crime: embezzlement. After investigating the crime and recovering lost funds, Lewis extensively researched the subject of fraud and embezzlement, authored three books on the topic and has written numerous articles about white-collar crime for local, state and national publications. Lewis earned the designation of “Certified Fraud Examiner” (CFE) from the Board of Regents of the Association of Certified Fraud Examiners. He is one of only two dentists in the world to hold this designation. He received his DDS from Case Western University School of Dentistry.

### *Objectives*

- ❖ Identify embezzlement more quickly by studying the embezzler’s profile.
- ❖ Prevent hiring an embezzler for your office.
- ❖ Establish strong internal control systems to protect your future income.
- ❖ Understand the discovery and investigation process.
- ❖ Learn from case studies of actual embezzlers.

JAMES CATHCART

## FOCUS: ACHIEVING YOUR HIGHEST PRIORITIES



The FOCUS: Achieving Your Highest Priorities workshop is the anchor of the Franklin Covey Focus Solution. This session teaches productivity skills integrated with a powerful planning system that helps individuals clarify, focus on and execute their highest priorities, both personally and professionally. You will understand how to establish a goal-setting process to help you become more focused and receive technology tips and best practices to help you manage the onslaught of information you receive daily.

James Cathcart joined the Franklin Covey Company in 1994. Since then, he has worked with corporate, educational, government, military and not-for-profit organizations in an effort to help them grow their businesses, achieve their objectives and enhance the quality of life of their employees. Previously, Cathcart has been a stand-up comedian, high-school teacher and Manager of Security for the Utah Transit Authority. He has also lived in South Africa and traveled the world extensively. Cathcart received his education in sociology and organizational behavior from Brigham Young University.

### *Objectives*

- ❖ Apply a goal-setting process that gets results.
- ❖ Stay focused every day with a reliable planning system that integrates the tools you use (planner, PDA, desktop).
- ❖ Achieve balance and renewal in your life to avoid burnout and cycles of frustration.
- ❖ Gain control of the competing demands on your time: e-mail, voice mail, meetings and interruptions.
- ❖ Reduce stress by recognizing and eliminating low-priority activities and distractions.

# Saturday

## TRANSITIONING YOUR PRACTICE AS CEO

### HOWARD ROCHESTIE



Howard Rochestie, JD, LLM, is currently Co-owner/Director and chief spokesperson for Mercer, a company he purchased with three partners in 1989 after serving as head of the technical services division, and then as Chief Executive Officer. Prior to this, Rochestie had practiced law as a trial attorney and started a company that grew to 22 locations, enabling him to retire at age 37. He received his JD from George Washington University, his Master of Law degree from Harvard Law School and his business degree in finance and economics from the University of Pennsylvania – Wharton School of Finance and Commerce.

### LIFE TRANSITIONS

As we go through passages in our lives, we need the right tools to assure that we establish the next chapters exactly the way we want. Adding associates and partners while we are practicing, planning our retirement and passing our wealth to future generations requires a conscious assessment of our goals and values. Unfortunately, there are not many role models to follow, given the few statistics around associateships and partnerships, the low percentage of dentists who are able to retire and maintain their standard of living, and the entitlement problems arising from a lack of estate planning. This presentation will offer you some of the tools and methodologies you can put in place so that your vision for the future becomes a reality.

#### *Objectives*

- ❖ Learn how to create the ideal life transitions that truly reflect your values and vision.
- ❖ Understand what process you can use that will avoid the common problems that most dentists face when going from one phase in life to another.
- ❖ Find out how to pass on not just your wealth but your values to your children and grandchildren.
- ❖ Discover how you can write the perfect next chapter in your life instead of just hoping it will work out.

### PRACTICE TRANSITIONS

Why do most practice transitions end up in failure? In this presentation, you will learn how to increase your lifestyle dramatically – and do the dentistry you love – with the proper transition planning for your practice. There is no financial investment you can make that generates a return anywhere close to the value created through a practice transition. Explore a detailed overview of current approaches to dental practice transition and value management. In addition, take away a step-by-step approach you can use to fast-track your transition timeline and maximize benefits. This presentation is not just about an exit strategy, but rather a path to career fulfillment, profitability and lifestyle.

#### *Objectives*

- ❖ Discover how, by using the right practice transition strategy, you can double what you would receive in a normal brokerage situation.
- ❖ Learn how to use transitions to give you the lifestyle you desire while you are working and after you retire.
- ❖ Realize why most transitions fail and how, with proper planning, you can experience great success.
- ❖ Understand how you can position your practice to attract qualified associates.
- ❖ Find out how to leverage the value of your practice and substantially add profitability while working less.

DARRELL CAIN

## LONG-TERM FINANCIAL PLANNING



Did you know that waiting just five to seven years to start a savings plan can negatively affect your potential earnings by over a million dollars? This presentation will explore types of pension plans and how to maximize your contributions. You will learn about various investment strategies – stocks, bonds, mutual funds, real estate – and how to manage wealth accumulation. Also, you will receive an update on current tax and pension laws pertaining to dentistry, and how to use them to your best advantage.

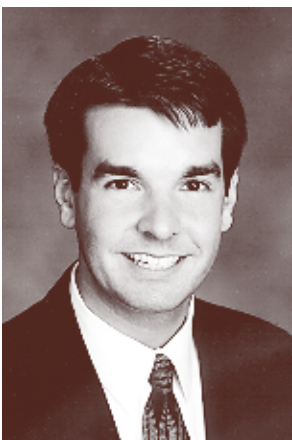
Darrell Cain is President of Cain, Watters & Associates, PC, a “fee only” certified public accounting firm located in Dallas, TX. Cain has designed financial plans for approximately 1,400 healthcare professionals across the country to help them take advantage of their earning power. His firm also provides tax and accounting services, ongoing financial monitoring, practice valuations and transitions, and estate planning for its financial counseling clients. Cain is a published author and lectures for dental societies, study clubs, state dental associations and investment symposia. Cain received his Bachelor of Business Administration degree and his MPA from Baylor University in Waco, TX.

### *Objectives*

- ❖ Review updated tax laws pertaining to dentistry.
- ❖ Understand which pension plans allow you to invest the most money with minimal cost to the staff.
- ❖ Explore how rising interest rates will affect the economy.
- ❖ Discover which investments you should consider and which investments you should run from.
- ❖ Find out how bringing a partner into your practice can positively impact your financial plan by millions of dollars.

JIM PIRAK

## WEALTH PRESERVATION AND RETIREMENT INCOME STRATEGIES



More than ever before, retirees are dependent upon their investments to generate retirement income. Longevity is the new retirement risk. You must ask yourself: Do I have enough assets to last as long as I do? Are they in the right places? Which assets should I use first? This session will look at the issues you face as you plan for your retirement years, and explore an investment strategy with the objective of providing you with an inflation-adjusted income for life.

Jim Pirak is Vice President of Marketing for Symetra Financial’s insurance subsidiaries. He is responsible for corporate communications, business development, market research and creative services. Pirak has been with Symetra Financial since 1994 when he was hired as a Marketing Manager for a predecessor company, Safeco Mutual Funds. In that position, he was responsible for marketing mutual funds through banks, insurance agents and financial planners. Prior to joining Symetra Financial, he was a financial planner with Pacific Capital Consulting, a Seattle-based investment firm. Pirak earned his Bachelor of Business Administration degree from the University of Washington.

### *Objectives*

- ❖ Learn how to establish long-term retirement security.
- ❖ Discover an innovative new approach to managing your investment portfolio.
- ❖ Gain insight into how to preserve your wealth while maintaining your desired lifestyle.

DAN TRIPPS

## WILLIAM SHAKESPEARE'S ADVICE FOR HEALTHY LIVING



“Lord, what fools these mortals be!” (*A Midsummer Night's Dream*, III, ii, 115). This is particularly true with regard to today's lifestyle choices. Diets replete with fats, oils, sugar, alcohol, cholesterol and processed foods have led to a rise in the incidence of obesity unparalleled in human history. In addition, despite all we know about the hazards of cigarettes, one out of every five deaths in the United States can be attributed to tobacco. And, success lifestyles have pushed the incidence of hypertension to one quarter of the population as heart disease extends its lead as the number one cause of death, approaching 1 million per year. This presentation will offer practical strategies that can help you improve your health and longevity.

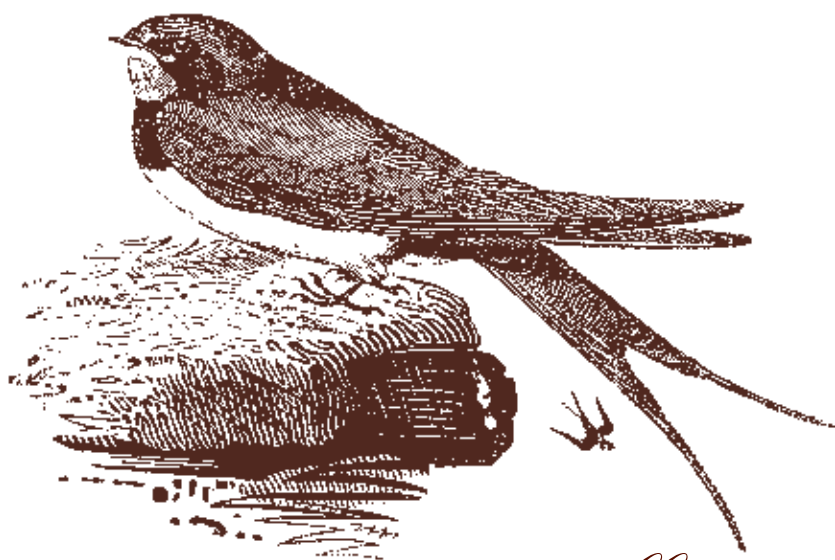
Dan Tripps, PhD, is Executive Director of the American Institute of Sport and Chair of Seattle University's Department of Sport Studies, where he teaches the psychology of leadership and achievement. Formerly, Tripps was President and Executive Director of the 1984 Olympic Scientific Congress, the sport science research program affiliated with the Olympic Games. He also established Sports for All, a UNESCO program that brings technical training to teachers and coaches in developing countries. Tripps has served as editor for 10 textbooks in elite human performance, written dozens of professional articles and delivered speeches for national and international organizations. He received his PhD in sports psychology from the University of Oregon and his Master's degree in education from Stanford University.

### *Objectives*

- ❖ Formulate a realistic perspective by clarifying personal values, accepting the frailty of the human condition, altering foolish behaviors and attending to reality.
- ❖ Learn how to accept personal responsibility for your actions by beginning with introspection, making difficult choices, confronting procrastination and establishing a cognitive direction.
- ❖ Start to initiate a healthy living strategy by understanding yourself, drafting a plan, engaging in a sensible, scientifically supported training program, and persevering over time.

### *Symposium Farewell Dinner*

Dust off those cowboy boots and grab your hat. We've been skittish about country music in the past, but this year we'll be two-stepping, line-dancing, toe-tapping and kicking up our heels in a kitschy and corny evening that Greg Tice has dubbed "Sweet Home Aviara." The question is, will the Four Seasons let the horses into the ballroom? Only if you join us for this goofball gala will you find out.



*swallow*

# *Programs*

# Doctor Program

TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Breakfast	Breakfast		Breakfast	Breakfast
Opening Ceremony & Keynote Oren Harari <i>Build Your Business</i>	Keynote Scott McKain <i>Leadership Dynamic</i>	[Optional Programs]	Keynote Pat Williams <i>Magic of Teamwork</i>	Keynote Howard Rochestie <i>Life Transitions</i>
Roger Levin <i>Competing for the Future</i>	Jack Higgins <i>Hiring Top Talent</i>	James Cathcart, Franklin Covey <i>FOCUS: Achieving Your Highest Priorities</i> <b>or</b> Robert Stutman <i>We Don't Know: What We Don't Know: Drugs, Our Kids, Our Neighborhood and Our Workplace</i>		Break
Break	Break		Break	Howard Rochestie <i>Practice Transitions</i> <b>or</b> Darrell Cain <i>Financial Planning</i> <b>or</b> Jim Pirak <i>Retirement Strategies</i>
Ben Griffin <i>Strategic Thinking</i>	Mike Scott <i>Team Management</i>		Michael Smith <i>Financial Planning</i>	
Lunch	Lunch	Lunch On Your Own	Lunch	Break
Barbara Lehman <i>Three Things ~ CEO</i>	Leigh Branham <i>The Seven Reasons Employees Leave</i>		Michael Schuster <i>The Bottom Line</i>	
Angela Pickett & Roger Levin <i>Marketing</i>	Transition	James Cathcart, Franklin Covey [continued] <b>or</b> Don Lewis <i>Theft &amp; Fraud</i>	Transition	
Angela Pickett <i>Marketing ~ Restorative</i> <b>or</b> Roger Levin <i>Marketing ~ Surgical</i>	Matt Paladini <i>Compensation Strategies</i> <b>or</b> Debra Phairas <i>Performance Evaluations</i> <b>or</b> Tim Twigg <i>Employment Law Compliance</i>		<i>Financial Statements</i> <b>or</b> <i>Cash Flow</i> <b>or</b> <i>Theft &amp; Fraud</i> <b>or</b> <i>Forecasting Your Future</i> <b>or</b> <i>Growth Consequences</i>	Directors' Session
Break			Break	
Keynote Oren Harari <i>Workshop</i>			<i>Financial Statements</i> <b>or</b> <i>Cash Flow</i> <b>or</b> <i>Theft &amp; Fraud</i> <b>or</b> <i>Forecasting Your Future</i> <b>or</b> <i>Growth Consequences</i>	
<i>Evenings</i>				
The Sanctuary Café ~ Joyce Cooling	U.S.S. Midway Welcome Reception	Awards Theater & Peking Acrobats	Wayne Dyer <i>The Power of Intention</i>	Farewell Dinner

Please note: Schedule subject to change and speaker substitutions may be made without notice.

- Meals & Breaks
- Keynotes
- General Sessions
- Breakout Sessions
- Evening Activities



# Coordinator ~ Staff ~ Spouse Program

TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Breakfast	Breakfast		Breakfast	Breakfast
Opening Ceremony & Keynote Oren Harari <i>Build Your Business</i>	Keynote Scott McKain <i>Leadership Dynamic</i>		Keynote Pat Williams <i>Magic of Teamwork</i>	Dan Tripps <i>Advice for Healthy Living</i>
Break	Dean Desrosiers <i>Leadership in Life</i>		James Cathcart, Franklin Covey <i>FOCUS: Achieving Your Highest Priorities</i>	Break
David Schwab <i>Profitability ~ Staff</i> <b>or</b> Barbara Lehman <i>Three Things ~ Spouse</i>	Break		Break	Dan Tripps [continued]
	Dean Desrosiers [continued]		James Cathcart, Franklin Covey [continued]	Break
Lunch	Lunch	On Your Own	Lunch	Closing Keynote
Jeff Dziak <i>Back to Basics: Ritz Style</i>	Robert Stutman <i>We Don't Know What We Don't Know: Drugs, Our Kids, Our Neighborhood and Our Workplace</i>		James Cathcart, Franklin Covey [continued]	
Break	Break		Break	
Jeff Dziak [continued]	Robert Stutman [continued]		James Cathcart, Franklin Covey [continued]	
Break				
Keynote Oren Harari <i>Workshop</i>				

## Evenings

The Sanctuary Café ~ Joyce Cooling	U.S.S. Midway Welcome Reception	Awards Theater & Peking Acrobats	Wayne Dyer <i>The Power of Intention</i>	Farewell Dinner
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Please note: Schedule subject to change and speaker substitutions may be made without notice.

Meals & Breaks
Keynotes
General Sessions
Breakout Sessions
Evening Activities

# Social Program

TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Breakfast	Breakfast		Breakfast	Breakfast
Opening Ceremony & Keynote Oren Harari <i>Build Your Business</i>	Keynote Scott McKain <i>Leadership Dynamic</i>		Keynote Pat Williams <i>Magic of Teamwork</i>	
Tai Chi*	Tai Chi*		Tai Chi*	
Lunch	Lunch	On Your Own	Lunch	Closing Keynote
	Batiquitos Lagoon Walk*		Batiquitos Lagoon Walk*	
Keynote Oren Harari <i>Workshop</i>				

## Evenings

The Sanctuary Café ~ Joyce Cooling	U.S.S. Midway Welcome Reception	Awards Theater & Peking Acrobats	Wayne Dyer <i>The Power of Intention</i>	Farewell Dinner
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Please note: Schedule subject to change and speaker substitutions may be made without notice.

\* These outdoor activities may be cancelled without substitution or refund in the event of bad weather.

Meals
Keynotes
Activities
Evening Activities

# The Fine Print

## Symposium Passport

Attendance at any presentation, meal or social function requires a passport to the Symposium.

### Doctor Program

Passport provides access to all presentations and social programming, including four breakfasts, three lunches, two dinners and three evening events (Joyce Cooling, Peking Acrobats and Wayne Dyer).

Payment on or before October 14: \$1995

Payment after October 14: \$2195

### Coordinator~Staff~Spouse Program

Passport provides access to all presentations and social programming, including four breakfasts, three lunches, two dinners and three evening events (Joyce Cooling, Peking Acrobats and Wayne Dyer).

Payment on or before October 14:

First attendee: \$1795

Additional attendees: \$1595

Payment after October 14:

First attendee: \$1895

Additional attendees: \$1695

*If you are planning to bring five or more from one practice for the Coordinator~Staff~Spouse Program, please call the SSC office for special pricing.*

### Social Program for Spouse, Guests or Young Adults (13 and above)

Passport provides access to social programming **only** (keynote speakers, four breakfasts, three lunches, two dinners and three evening events – Joyce Cooling, Peking Acrobats and Wayne Dyer).

Payment on or before October 14: \$1195

Payment after October 14: \$1295

### Children

Passport provides access to four breakfasts, three lunches, two dinners and two evening events (Joyce Cooling and Peking Acrobats).

Ages 7–12: \$395

6 and under: Free

## Registration

Register online, by mail or by fax:

Seattle Study Club  
205 Lake Street South, Suite 100  
Kirkland, WA 98033  
Phone: 425.576.8000  
Fax: 425.827.4292  
E-mail: [lisa@seattlestudyclub.com](mailto:lisa@seattlestudyclub.com)  
[www.seattlestudyclub.com](http://www.seattlestudyclub.com)

Please let us know if you are registering two or more individuals with different surnames (so we may seat you together at the social functions). Of course, your registration is not confirmed without full payment in advance.

*Schedule is subject to change and speaker substitutions may be made without notice.*

## When & Where

January 24–28, 2006; The Four Seasons Resort, Aviara. The room rate is \$295 per night plus resort fee and tax. A first and last night's non-refundable deposit will be charged to your credit card upon making the reservation. Call the hotel directly at 760.603.6800.

## Alternate Hotels

La Costa Resort and Spa  
800.854.5000, [www.lacosta.com](http://www.lacosta.com)

Hilton Garden Inn  
760.476.0800, [www.hiltongardeninn.com](http://www.hiltongardeninn.com)

Fairfield Inn Carlsbad  
760.438.2828, [www.marriott.com](http://www.marriott.com)

## Hotel Room Guarantee

The Four Seasons requires a guarantee that your room will be paid for all six nights (M/T/W/Th/F/S). If you arrive late or check out early, or you need to cancel your hotel reservation, please obtain the hotel's written agreement to avoid being charged for the full reserved stay. You are responsible for your own room and other charges at the hotel. Please be sure you understand hotel policy regarding reservation changes, and consider travel insurance if snow or bad weather may affect your travel plans.

## AGD: 24 CE Credits



This is a lecture and workshop based program suitable for all attendees regardless of prior business experience. The Seattle Study Club is a PACE-approved provider of continuing education (10/19/03 to 10/18/07).

## SSC Cancellation & Refund Policy

Written notice of cancellation must be sent by certified mail to the Seattle Study Club office, 205 Lake Street South, Suite 100, Kirkland, WA 98033 on or before the dates shown below to be effective. Cancelled registrants are not entitled to receive Symposium materials and gifts (manuals, books, bags, shirts or any other items that may be provided to the attendees).

- ❖ By November 14, 2005:  
\$200 retained, remainder refunded.
- ❖ November 15–December 30, 2005:  
25% credited toward Symposium 2007.
- ❖ On or after December 31, 2005:  
No refund or credit.

*The cancellation and refund policy applies regardless of the reason for cancellation, including but not limited to unforeseen personal or world events.*

# Symposium Registration

Mail or fax to SSC, 205 Lake Street South, Suite 100, Kirkland, WA 98033

Phone 425.576.8000 Fax 425.827.4292

Copy this page if additional forms are needed.

By submitting a registration form, each registrant acknowledges and agrees to the terms of the cancellation and refund policy, the full text of which is shown on page 26 of this brochure.

The cancellation and refund policy applies regardless of the reason for cancellation, including but not limited to unforeseen personal or world events.

## Doctor Registration

Name \_\_\_\_\_

GP OS Perio Prosth Ortho Endo Lab Other  
[Circle One]

Club Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Home ( ) \_\_\_\_\_

Work ( ) \_\_\_\_\_

Fax ( ) \_\_\_\_\_

Mobile ( ) \_\_\_\_\_

E-mail \_\_\_\_\_

Dietary Restrictions \_\_\_\_\_

### Travel Arrangements

I am staying at: [ ] Four Seasons [ ] Other \_\_\_\_\_

### Doctor Tuition

On or before October 14 \$1995 \_\_\_\_\_

After October 14 \$2195 \_\_\_\_\_

### Thursday Optional Workshops

[Limited availability. First-come, first-served basis.]

\_\_\_\_\_ James Cathcart, Franklin Covey  
(9:00 a.m.-4:00 p.m.) Book Fee \$75 \_\_\_\_\_

\_\_\_\_\_ Robert Stutman, Drugs (9:00-11:30 a.m.)

\_\_\_\_\_ Don Lewis, Theft & Fraud (1:00-4:00 p.m.)

The opportunity to choose breakout sessions on Wednesday and Friday will be available in the Confirmation Packet and assigned based upon date registered.

**SUBTOTAL (first column):** \_\_\_\_\_

**SUBTOTAL (second column):** \_\_\_\_\_

**TOTAL:** \_\_\_\_\_

## Coordinator~Staff~Spouse Registration

Name \_\_\_\_\_

Coordinator Staff Spouse Other  
[Circle One]

Club Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Home ( ) \_\_\_\_\_

Work ( ) \_\_\_\_\_

Fax ( ) \_\_\_\_\_

Mobile ( ) \_\_\_\_\_

E-mail \_\_\_\_\_

Dietary Restrictions \_\_\_\_\_

### Travel Arrangements

I am staying at: [ ] Four Seasons [ ] Other \_\_\_\_\_

### Coordinator~Staff~Spouse Full Program Tuition

On or before October 14

First attendee \$1795 \_\_\_\_\_

Additional attendees # \_\_\_ @ \$1595 \_\_\_\_\_

After October 14

First attendee \$1895 \_\_\_\_\_

Additional attendees # \_\_\_ @ \$1695 \_\_\_\_\_

If you are planning to bring five or more from one practice for the Coordinator~Staff~Spouse Program, please call the SSC office for special pricing.

### Social Program Only

On or before October 14 \$1195 \_\_\_\_\_

After October 14 \$1295 \_\_\_\_\_

Children (ages 7-12) # \_\_\_ @ \$395 \_\_\_\_\_

Name \_\_\_\_\_

Name \_\_\_\_\_

## Payment Information

Payment Type: [ ] Visa [ ] MC or Check # \_\_\_\_\_

Credit Card # \_\_\_\_\_ Expiration Date \_\_\_\_\_

Name on Card \_\_\_\_\_

Billing Address for Card \_\_\_\_\_

\_\_\_\_\_ Zip \_\_\_\_\_