

HELLO
MY NAME IS

~~Dentist~~ CEO

DENTIST AS CEO

The Science Behind Financial Success

“In the end, all business operations can be reduced to three words: people, product and profits.”

— Lee Iacocca

Seems fairly obvious, doesn't it? The problem is, while most dental schools are adept at teaching clinicians how best to create the *product* called dentistry, few if any instruct on how to maximize *profits* and manage *people* while we conduct the *business* of dentistry. Yet, without a command of these basic business skills, true financial security remains an elusive goal. Instead, most of us simply focus on producing more and more dentistry, but with it comes a huge physical and mental toll. Do we really have to work this hard to succeed?

Symposium 2015 offers the tools to solve this problem in four intense days of immersion in the fundamentals of running a small business. We're bringing in some of the top business thinkers from inside and outside dentistry to teach us how to work smarter, not harder, by using proven business methods such as SWOT analysis, hiring matrices, financial scorecards, overhead control and performance measurement. Together with sessions on negotiation, leadership, accountability and the discipline of execution, this program is packed with learning that promises both personal and professional benefits.

Relax. Financial security is attainable once we understand and implement the tools and techniques we'll learn about at Symposium 2015. This is Dentist as CEO—the science behind financial success.



2015 SEATTLE STUDY CLUB® SYMPOSIUM
THE RITZ-CARLTON, AMELIA ISLAND, FLORIDA
JANUARY 21-24, 2015

WEDNESDAY

BREAKFAST

OPENING CEREMONIES

LEADERSHIP BRILLIANCE IN THE MIDST OF UNCERTAINTY

Mr. Simon T. Bailey

Lecture, Up to 1.0 hrs., AGD Subject Code: 770

THE TOTALLY ACCOUNTABLE™ WORKPLACE: A PREDICTABLE WAY TO INCREASE PROFITABILITY

Mr. Mike Scott

Lecture, Up to 1.0 hrs., AGD Subject Code: 550

GETTING YOUR FINANCIAL ACT TOGETHER AND PREPARING FOR THAT STANDING OVATION

Mr. Jordan Goodman

Lecture, Up to .75 hrs., AGD Subject Code: 552

LUNCH

3-Hour Sessions

90-Minute Sessions

THE FINANCIAL SCORECARD Mr. Steve Lefever Lecture, Up to 3.0 hrs., AGD Subject Code: 552	ASSOCIATE TO PARTNER Mr. Dan Wicker Lecture, Up to 3.0 hrs., AGD Subject Code: 556	LEADERSHIP Mr. Simon T. Bailey Lecture, Up to 1.5 hrs., AGD Subject Code: 770	MARKETING IN A COMPETITIVE ENVIRONMENT Dr. Roger Levin Lecture, Up to 1.5 hrs., AGD Subject Code: 550	STRATEGIC PLANNING Ms. Erica Olsen Lecture, Up to 1.5 hrs., AGD Subject Code: 770	ACCOUNTABILITY Mr. Mike Scott Lecture, Up to 1.5 hrs., AGD Subject Code: 552
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Please select one 3-hour session or two 90-minute sessions.

ASK THE EXPERT: YOUR MONEY QUESTIONS ANSWERED

Mr. Jordan Goodman

Lecture, Up to .75 hrs., AGD Subject Code: 552

WELCOME DINNER

THURSDAY

BREAKFAST

THE UPSIDE OF STRESS: A HIGHLY EFFECTIVE TRANSFORMATIONAL APPROACH

Dr. Kelly McGonigal

Lecture, Up to .75 hrs., AGD Subject Code: 770

THE IDEA HUNTER: INNOVATION AND CREATIVITY IN ACTION

Dr. Andy Boynton

Lecture, Up to .75 hrs., AGD Subject Code: 770

TRANSFORMING THE DENTAL PRACTICE INTO A REAL-WORLD BUSINESS: A CASE STUDY

Dr. Roger Levin

Participative Workshop, Up to 1.75 hrs., AGD Subject Code: 149

LUNCH

3-Hour Sessions

90-Minute Sessions

BUILDING YOUR FINANCIAL LEGACY Mr. Tim Greaves Lecture, Up to 3.0 hrs., AGD Subject Code: 552	PROFIT MASTERY: BREAK-EVEN 360° Mr. Steve Lefever Lecture, Up to 3.0 hrs., AGD Subject Code: 550	EMPLOYEE EMBEZZLEMENT AND FRAUD Dr. Donald Lewis, Jr. Lecture, Up to 1.5 hrs., AGD Subject Code: 550	STRATEGIC PLANNING Ms. Erica Olsen Lecture, Up to 1.5 hrs., AGD Subject Code: 770	SELECTING TOP PERFORMERS Mr. Bob Salvin and Mr. Greg Slayton Lecture, Up to 1.5 hrs., AGD Subject Code: 551	EMPLOYMENT LAW AND COMPLIANCE Mr. Tim Twigg Lecture, Up to 1.5 hrs., AGD Subject Code: 555
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Please select one 3-hour session or two 90-minute sessions.

FRIDAY

BREAKFAST

WIN-WIN: NEGOTIATE LIKE A PRO

Dr. George Lucas

Lecture, Up to 1.0 hrs., AGD Subject Code: 550

IDENTITY THEFT: ARE YOUR SECRETS SAFE?

Mr. John Sileo

Lecture, Up to 1.0 hrs., AGD Subject Code: 550

2-Hour Session

60-Minute Sessions

HACKERS AND INTERNET ATTACKERS Mr. John Sileo Lecture, Up to 2.0 hrs., AGD Subject Code: 561	HIGH PERFORMANCE TEAMWORK Dr. Andy Boynton Lecture, Up to 1.0 hrs., AGD Subject Code: 551	INVESTING IN YOUR PRACTICE Mr. Charles Cohen Lecture, Up to 1.0 hrs., AGD Subject Code: 550	THE 4 DISCIPLINES OF EXECUTION Mr. Jeffery Downs Lecture, Up to 1.0 hrs., AGD Subject Code: 550	HOW TO NEGOTIATE OFFICE LEASES Mr. Lewis Gelmon Lecture, Up to 1.0 hrs., AGD Subject Code: 550	EFFECTIVE NEGOTIATIONS Dr. George Lucas Lecture, Up to 1.0 hrs., AGD Subject Code: 550
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Please select the 2-hour session or two 60-minute sessions.

LUNCH

THINKING LIKE A CEO: CHALLENGING FINANCIAL CASE STUDIES

Mr. Darrell Cain

Participative Workshop, Up to 1.5 hrs., AGD Subject Code: 149

TAKE YOUR BEST SHOT: RE-ENERGIZING YOUR PRACTICE

Mr. Ken Futch

Lecture, Up to .75 hrs., AGD Subject Code: 550

JUDITH OWEN WITH SPECIAL GUESTS

SATURDAY

BREAKFAST

TAKING CHARGE OF YOUR PRACTICE AND PERSONAL LIFE!

Mr. Pinhas Adar

Lecture, Up to 1.0 hrs., AGD Subject Code: 149

CREATE A STRONG BRAND: FOCUS ON PATIENT EXPERIENCE

Mr. Richard Laube

Lecture, Up to .75 hrs., AGD Subject Code: 557

CASE STUDY: STRATEGIES FOR OVERTAKING THE COMPETITION

Dr. Andy Boynton

Participative Workshop, Up to 1.5 hrs., AGD Subject Code: 550

General Session

Directors Session

LUNCH

DIRECTORS LUNCH

MAXIMIZING PRACTICE VISIBILITY THROUGH SOCIAL MEDIA AND SEO

Dr. Lou Shuman

Lecture, Up to 1.25 hrs.,
AGD Subject Code: 561

DIGITAL MARKETING

Mr. Ian McNickle

Lecture, Up to .25 hrs.,
AGD Subject Code: 562

THE ART, SCIENCE AND BUSINESS OF CLINICAL IMPLANT PRACTICE

Dr. Paul Fugazzotto

Lecture, Up to 1.0 hrs.,
AGD Subject Code: 690

PRACTICE SUCCESS THROUGH OVERHEAD CONTROL AND INCREASED PATIENT FLOW

Dr. Samuel Smiley

Lecture, Up to .50 hrs.,
AGD Subject Code: 560

REVERSING THE FLOW

Dr. Lee Sheldon

Lecture, Up to .50 hrs.,
AGD Subject Code: 550

ARE YOU BEING TAKEN TO THE CLEANERS, OR ARE YOU CLEANING UP IN YOUR HYGIENE DEPARTMENT?

Dr. Robert Margeas

Lecture, Up to .50 hrs.,
AGD Subject Code: 560

MAKING MARKETING PERSONAL

Dr. Jason Stoner

Lecture, Up to .50 hrs.,
AGD Subject Code: 770

A MUSICAL CELEBRATION WITH ALLEN STONE



Steve LeFever



Dan Wicker

WEDNESDAY

January 21, 2015

LEADERSHIP BRILLIANCE IN THE MIDST OF UNCERTAINTY

Mr. Simon T. Bailey

At any given moment, someone, somewhere is looking to another person as a role model of how to think, feel, be and act. The responsibility of every leader is to guide their organization and business beyond all expectations, or risk inhibiting its growth through entropy. Knowing this, leaders must remember that their actions in the present influence what happens to the future of their businesses and teams. This requires “Leadership Brilliance,” a mindset that encourages “LeaderShift.” Simply put, this encourages letting go of what is comfortable and convenient to create what is progressive and desirable in order to propel one’s practice and life to new levels.

Upon completion of this course, attendees should be able to:

- Redefine their role within their team or practice.
- Improve their ability to connect with their team, instead of just communicating.
- Create a high-performing team that exceeds expectations.



Mike Scott



Simon T. Bailey

THE TOTALLY ACCOUNTABLE™ WORKPLACE: A PREDICTABLE WAY TO INCREASE PROFITABILITY

Mr. Mike Scott

Clinicians are not just the owners of their practices; they are also primarily responsible for production. This holds them highly accountable for the prosperity of their business, the care of their patients and the vitality of their team. However, everyday issues are stumbling blocks to achieving success in all these areas—needless mistakes, errors in communication and lack of follow-up. This presentation will cover the everyday issues that impede progress and teach practical steps to overcome them.

Upon completion of this course, attendees should be able to:

- Increase production by accomplishing more in the same amount of time.
- Develop a personal action plan for success that can be implemented immediately in the pursuit of a thriving dental practice.

GETTING YOUR FINANCIAL ACT TOGETHER AND PREPARING FOR THAT STANDING OVATION

Mr. Jordan Goodman

During this witty and engaging session, Mr. Goodman will share simple yet priceless financial gems. He will give attendees a quick-paced review of how to make the most of their money in every way, including picking stocks, bonds and mutual funds, managing credit wisely, financing college education, maximizing employee benefits and much more.

Upon completion of this course, attendees should be able to:

- Identify how to make the most of their hard-earned dollars.
- Implement secret tricks to cut expenses and grow their money.



Roger Levin



Jordan Goodman

ASK THE EXPERT: YOUR MONEY QUESTIONS ANSWERED

Mr. Jordan Goodman

During this lively session, “America’s Money Answers Man,” Jordan Goodman, will shed light on a range of economic concerns—from practice to personal life—by offering insightful solutions to the dilemmas presented by attendees. Armed with decades of experience, clever repartee and an engaging stage presence, Mr. Goodman is the perfect conclusion to what will be an exceptional first day.

Upon completion of this course, attendees should be able to:

- Discover answers to important financial questions.
- Arm themselves with information to help advise their future financial decisions.



Erica Olsen

“Everything you need is already inside of you. Stop looking outside for what exists inside.”

— Mr. Simon T. Bailey

WEDNESDAY

3-Hour Breakout Sessions

PROFIT MASTERY AND THE FINANCIAL SCORECARD: A ROAD MAP TO EVALUATE AND DRIVE FINANCIAL PERFORMANCE

Mr. Steve LeFever

Participants in this course will work with a case study to learn how to solve the root cause of financial problems—instead of treating the symptoms. They will also learn how to analyze the performance of a dental practice with financial ratios and how to use industry comparison analysis. In addition, Mr. LeFever will introduce the “Financial Road Map.” This valuable graphic tool will help practice owners see how different parts of a business can drive financial performance. Participants will understand what financial statements really tell them about their dentistry operation and gain expertise and confidence to take action.

Upon completion of this course, attendees should be able to:

- Discern the difference between profits and cash flow.
- Use financial analysis as a tool to improve profits and increase cash flow.
- Create a practical process—using ratios—to assess financial performance and identify strengths, weaknesses and areas of opportunity.

“When you don’t know where you are, it is difficult to chart a future course.”

— Mr. Steve LeFever

ASSOCIATE TO PARTNER: SOUND STEPS TO SUCCESSFUL PRACTICE TRANSITION

Mr. Dan Wicker

Entering a partnership and transitioning a dental practice are wonderful financial opportunities for the associate, buyer and seller. However, partnership/transition opportunities are not just about dollars and cents. Creating a perfect partnership structure and taking into account intangibles, like goodwill and dedication, are of utmost importance. Failure to address these aspects leads to a large number of failed partnerships and to associates that never become partners. For 30 years, Cain Watters has created a methodology to transition dental practices of all specialties and has successfully done so over 600 times with a high associate-to-partner success rate. This course will present information on how to create a successful partnership that is fair and equitable to both parties. In addition, it will show how a transition can have significant tax advantages for both the buyer and seller, creating a win-win transition.

Upon completion of this course, attendees should be able to:

- Recognize all the considerations when contemplating a partnership.
- Identify the most financially opportune time to sell and how the sale can affect future earnings.
- Decide whether bank financing or owner financing is appropriate.
- Determine how money will be split and each party will be incorporated.

Please select either a 3-hour session or two 90-minute sessions on the registration form.

90-Minute Breakout Sessions

LEADERSHIP: LEAD, ENGAGE AND GROW BRILLIANTLY STARTING TOMORROW!

Mr. Simon T. Bailey

Stale. Stuck. Spiritless. That is what a leader, then a team and ultimately a business becomes when mojo is lost. In order for leaders to reinvigorate and ignite a fresh mindset that enables a team and a practice to thrive, they must stop communicating and start connecting. Connection begins when leaders make a commitment to bring out the best in themselves and then do the same with everyone around them. This challenges team members to raise the bar on their engagement and productivity, ultimately resulting in patients becoming brand champions for that practice.

Upon completion of this course, attendees should be able to:

- Start what is necessary, stop what is no longer relevant and continue what is working.
- Practice the “shift mindset” that aligns heads, hearts and hands to achieve results.

BUILDING THE ULTIMATE MASTER PLAN FOR MARKETING IN A COMPETITIVE ENVIRONMENT

Dr. Roger Levin

Dental practices face more competition today than in any previous era. Marketing is a key driver of practice growth. In order to remain successful, dental practices will need to implement effective marketing strategies. This workshop will focus on the critical changes occurring in dentistry and will show attendees how they can create innovative marketing for their practices and overcome the challenges many practices face today. Dr. Levin will also cover the use of customer service as a marketing tool, keeping and growing patient and doctor referrals, increasing practice affinity in the community, establishing and maintaining a powerful brand and managing the practice’s reputation in the Internet age.

Upon completion of this course, attendees should be able to:

- Gain a deeper understanding of the current state of dentistry and how permanent changes are affecting dental practice marketing.
- Outline a marketing program that will allow their practice to flourish.

STRATEGIC PLANNING: A REAL-WORLD APPROACH TO BUSINESS AND PRACTICE SUCCESS

Ms. Erica Olsen

When strategic thinking and SWOT analysis (strengths, weaknesses, opportunities and threats) are applied in a management process, they are powerful tools for the success of any practice. Together they involve the generation and application of unique business insights and opportunities intended to create a competitive advantage for any clinician. Strategy is the most impactful ingredient for superior practice performance, and few clinicians manage the strategic process well. They have to deal with an uncertain world where the only certainty is that the plan will change. This course will teach attendees how to apply strategic thinking and SWOT analysis in the planning and execution of any practice.

Upon completion of this course, attendees should be able to:

- Apply the key elements of strategic thinking to develop an effective strategic planning process for their practice.
- Understand how the SWOT analysis tool can be used for planning purposes.

ACCOUNTABILITY: THE THREE KEYS TO ACHIEVING FINANCIAL SUCCESS

Mr. Mike Scott

This session is designed to help clinicians and team members stop tolerating what isn’t working and focus on what needs to change for higher levels of success. Attendees will learn what keeps a practice from achieving the highest possible results for its patients and how their personal actions and prejudices stop progress in its tracks. This course will focus on three critical, yet simple, solutions to create clear communication, enhance personal effectiveness and keep the team operating in a proactive, accountable mode.

Upon completion of this course, attendees should be able to:

- Identify unproductive actions and thoughts before they cause damage.
- Determine the difference between really showing up and just existing.

THURSDAY

January 22, 2015



Tim Twigg

THE UPSIDE OF STRESS: A HIGHLY EFFECTIVE TRANSFORMATIONAL APPROACH

Dr. Kelly McGonigal

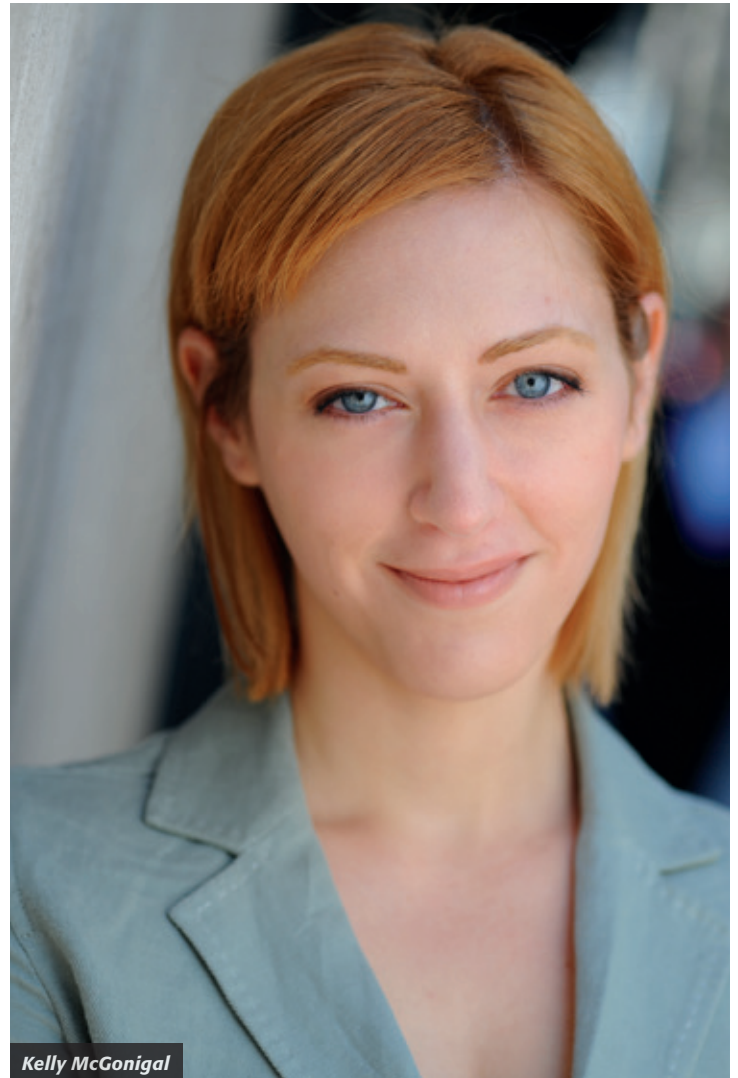
Stress is unavoidable. But is it always harmful? Stanford psychologist and award-winning author Kelly McGonigal offers a surprising new view of stress—one that reveals the upside of stress and how to capitalize on its benefits. The latest science shows that, with the right mindset, stress can make people smarter, stronger and more resilient. Stress can even help individuals connect with what they care about most and strengthen close relationships. The new science of stress resilience will give attendees a renewed sense of optimism about their own abilities to handle whatever challenges life brings.

Upon completion of this course, attendees should be able to:

- Cultivate a “challenge” mindset that helps them thrive under stress.
- Transform the biology of their stress response to improve health and well-being.
- Create resilience to prevent stress-related harm through social connections and compassion.



Bob Salvin



Kelly McGonigal



Tim Greaves



Greg Slayton



Donald Lewis, Jr.



Andy Boynton

THE IDEA HUNTER: INNOVATION AND CREATIVITY IN ACTION

Dr. Andy Boynton

Innovative business ideas don't just spring from innate creativity or from the minds of brilliant people. New ideas are the lifeblood for any business and come to those who are in the habit of looking for great ideas all around them, all the time. Too often, people fall into the trap of thinking the only worthwhile idea is a thoroughly original one. Idea hunters know better. They understand that valuable ideas are already out there, waiting to be found—and not just in the usual places.

Upon completion of this course, attendees should be able to:

- Understand the steps to unlock innovative behavior.
- Demystify what innovation is, what it is not, and realize it is a valuable resource for any business.

*“Behaviors trump IQ
and brains. Period.”*

– Dr. Andy Boynton

TRANSFORMING THE DENTAL PRACTICE INTO A REAL-WORLD BUSINESS: A CASE STUDY

Dr. Roger Levin

Just as dentists learn clinical skills through the careful review of clinical cases, top business school professors train future business leaders using the highly effective case study method. Using data from numerous sources within and outside of the dental profession, Dr. Levin will present a detailed review of an actual practice situation chosen from the Levin Group Data Center™. From the examples featured in the case study, attendees will be introduced to numerous transformational concepts to increase efficiency and production through proven business systems. Attendees will conduct roundtable discussions facilitated by Dr. Levin, and create real-world solutions that can be applied to their own practices.

Upon completion of this course, attendees should be able to:

- Comprehend a fact-based, data-driven case study analysis of a dental practice that transformed into a real-world business.
- Employ the concept of patient-centric culture to their practice and experience the benefits as a result.

THURSDAY

3-Hour Breakout Sessions

BUILDING YOUR FINANCIAL LEGACY: 10 STEPS TO WEALTH ACCUMULATION

Mr. Tim Greaves

This workshop is divided into three parts: accumulation, preservation and perpetuation. The individual sections will be taught in detail and will deliver the most current information on each, beginning with accumulation. This encompasses a clinician's practicing career, in which approximately 30 years is spent amassing enough assets to retire financially free. The preservation phase, which starts prior to retirement, explains how clinicians carefully transition to living off their accumulated assets for at least 30 more years. The perpetuation phase teaches how to determine one's legacy. Throughout the course, attendees will learn about current pension laws, specific tax strategies for dentists and how to come up with the money to fund retirement.

Upon completion of this course, attendees should be able to:

- Understand the proven math behind wealth accumulation.
- Utilize the best tax strategies to further their plan and maximize cash flow.
- Pinpoint the most beneficial investment environments.

PROFIT MASTERY: BREAK-EVEN 360°— THE BEST TOOL TO IDENTIFY, MEASURE AND MANAGE THE KEY PROFIT DRIVERS IN YOUR DENTAL PRACTICE

Mr. Steve LeFever

This course will offer a uniquely powerful tool, "Break-Even Analysis," which will provide attendees an action plan to identify and capture incremental profits. Using a 360-degree approach to profit management, clinicians will see performance measurement in a whole new light and will implement a process to squeeze additional profits out of their practice forever—in tough or good times. Attendees will receive the tools needed to increase profitability by controlling costs, understanding cost behavior, improving strategic cost management skills and analyzing the present to make better decisions about the future. By gaining a more detailed understanding of cost behavior, dental practice owners and managers will be better equipped to evaluate the impact of strategic decisions on the profitability of their business.

Upon completion of this course, attendees should be able to:

- Calculate their cost structure and the break-even level in their business.
- Determine where it is appropriate to cut costs and raise prices.
- Establish profit targets in their business.

“Find the money.”

— Mr. Tim Greaves

Please select either a 3-hour session or two 90-minute sessions on the registration form.

90-Minute Breakout Sessions

EMPLOYEE EMBEZZLEMENT AND FRAUD: SCAMS, SCHEMES AND BROKEN DREAMS

Dr. Donald Lewis, Jr.

White-collar criminals attack the small business owner with a variety of different schemes each and every day. Too often, these attacks occur over time by members of the dental team. Dr. Lewis will provide take-home, proven, internal control systems to safeguard assets. Using real-life cases to illustrate, this course will take a comprehensive look into computer fraud, payroll schemes, check tampering and bogus invoice schemes, as well as false refunds and voids, so practice owners can empower themselves with enough knowledge to reduce the risk of becoming a victim.

Doctors and spouses only.

Upon completion of this course, attendees should be able to:

- Identify the signs of criminal behavior and the fraud triangle—when seemingly good people commit embezzlement.
- Incorporate internal controls to detect and prevent loss.

REPEAT FROM WEDNESDAY

STRATEGIC PLANNING: A REAL-WORLD APPROACH TO BUSINESS AND PRACTICE SUCCESS

Ms. Erica Olsen

When strategic thinking and SWOT analysis (strengths, weaknesses, opportunities and threats) are applied in a management process, they are powerful tools for the success of any practice. Together they involve the generation and application of unique business insights and opportunities intended to create a competitive advantage for any clinician. Strategy is the most impactful ingredient for superior practice performance, and few clinicians manage the strategic process well. They have to deal with an uncertain world where the only certainty is that the plan will change. This course will teach attendees how to apply strategic thinking and SWOT analysis in the planning and execution of any practice.

Upon completion of this course, attendees should be able to:

- Apply the key elements of strategic thinking to develop an effective strategic planning process for their practice.
- Understand how the SWOT analysis tool can be used for planning purposes.

SELECTING TOP PERFORMERS: A PROVEN HIRING MATRIX

Mr. Bob Salvin and Mr. Greg Slayton

Just about every business owner has lost sleep, stomach lining and heart muscle from the stress caused by poor hiring decisions. Dental schools spend little time teaching how to hire, and the learning curve to do this well can be expensive. Hiring the best people cannot be left to serendipity; specific outcomes must be defined and the team must be involved. Using a proven, strategic process called the “Hiring Matrix” and “move forward or pass” (questions at multiple points in the hiring process), practice owners can be assured they hire the very best from their pool of candidates.

Upon completion of this course, attendees should be able to:

- Use the “Gut Check Litmus Test” (questions to hire top performers, associates or partners).
- Recognize when they must absolutely pass on an otherwise qualified candidate.
- Translate and communicate their practice culture to attract and retain “Top Gun” employees.

EMPLOYMENT LAW AND COMPLIANCE: GUIDELINES TO MANAGING RISK SUCCESSFULLY

Mr. Tim Twigg

Because human resource management and compliance with the variety of state and federal labor regulations are subjects not taught in the typical dental school curriculum, doctors often find themselves in court regarding employment issues. Such lawsuits can be emotionally draining and financially devastating. Geared for the dentist and owner, this presentation delves deeply into how to apply proven, professional personnel management techniques to help take the risk out of being an employer and insure employment law compliance.

Doctors and spouses only.

Upon completion of this course, attendees should be able to:

- Minimize exposure to potentially costly lawsuits and complaints.
- Define the rights and responsibilities of the employer and employees.



George Lucas



Charles Cohen



Lewis Gelmon

FRIDAY

January 23, 2015



John Sileo

WIN-WIN: NEGOTIATE LIKE A PRO

Dr. George Lucas

This session will help attendees not only get the results they want and need, but become more efficient in the process. Audience members will learn the four fundamental negotiation strategies and receive guidance on when each one should be used. They will also better understand the role of collaboration as the optional approach, when it is possible, and the most common mistakes people make when attempting to use this win-win approach.

Upon completion of this course, attendees should be able to:

- List the four different negotiation strategies and when each strategy should be used.
- Create win-win situations through effective negotiation.

IDENTITY THEFT: ARE YOUR SECRETS SAFE?

Mr. John Sileo

Due to the alluring power of personally identifiable information, practice owners must leverage formidable tools to protect everything from Social Security numbers and patient records to passwords and intellectual property. Nobody knows this better than John Sileo. His identity was stolen and used to embezzle \$300,000 from his business clients. The exposure destroyed his company and consumed two years as he fought to stay out of jail. In this presentation, Mr. Sileo will share his fascinating story of losing everything with the intent to help attendees “own” their identities and take responsibility for sensitive patient data before it is used against them.

Upon completion of this course, attendees should be able to:

- Take the necessary steps to protect their own identities.
- Safeguard patient data from possible cybercrime attacks.

“Negotiation impacts every aspect of our lives...”

– Dr. George Lucas



Jeffery Downs



Darrell Cain

THINKING LIKE A CEO: CHALLENGING FINANCIAL CASE STUDIES

Mr. Darrell Cain

Working with the Seattle Study Club® network over the years, what Cain Watters has learned is that its members really understand the language of “case studies.” After nearly 30 years of financial advising, CWA has amassed an arsenal of case studies. This session will provide a set of facts about several cases for attendees to examine, discuss and make recommendations. The ultimate outcome for each case will also be revealed, some of which are success stories and others are failures, but all with something to teach.

Upon completion of this course, attendees should be able to:

- Understand the difference between debt reduction and wealth accumulation.
- Set realistic goals for their financial plan, both personally and professionally.



Ken Futch

TAKE YOUR BEST SHOT: RE-ENERGIZING YOUR PRACTICE

Mr. Ken Futch

A moment can change a life. A perspective can change a practice. During this session, Mr. Futch will share his astonishing true story of how he accidentally shot himself in the head and how it opened his mind! Many dental practices shoot themselves in the foot, not the head, by failing to monitor their “thermometer of office energy.” An energetic staff attracts new patients and keeps long-term patients. When a team works together with positive energy, work satisfaction increases and turnover decreases. This hilarious and inspiring message will introduce attendees to the many opportunities that directly impact the bottom line.

Upon completion of this course, attendees should be able to:

- Create an environment that will foster motivation.
- Transform their business and personal lives with shots of positive energy.

FRIDAY

2-Hour Breakout Session

DATA SPIES, HACKERS AND INTERNET ATTACKERS: BULLETPROOFING YOUR DENTAL PRACTICE IN THE DIGITAL AGE

Mr. John Sileo

Every move made in the digital world can be tracked, recorded and exploited. Is the information the office shares on social networks protected? Are risks understood when storing sensitive intellectual property in the Microsoft Cloud, under someone else's control? Are smartphones, tablets and wi-fi a recipe for costly mobile data exposure? The results can be devastating when dental practices unknowingly stack the deck in favor of data thieves; however, when technological innovations are used as an advantage, the bottom line will not just be protected, it will benefit. This presentation highlights current data privacy threats and practical, tactical solutions as they apply specifically to the dental industry.

Upon completion of this course, attendees should be able to:

- Recognize live, tech-enabled data threats that serve as a privacy wake-up call.
- Apply the Think Like a Spy™ framework to tech-enabled risk.
- Identify human manipulation techniques at the root of digital data theft.

“Identity theft affects businesses to the tune of \$60 billion every year.”

— Mr. John Sileo

60-Minute Breakout Sessions

UNLOCKING THE POTENTIAL FOR HIGH PERFORMANCE TEAMWORK

Dr. Andy Boynton

The right team can mean the difference between an ordinary practice and a thriving, competitive one. As the dean of the Carroll School of Management at Boston College, Dr. Boynton knows this well. This course will feature several video case studies that illustrate essentials to creating and leading great teams, unlocking the potential for teamwork in any practice.

Upon completion of this course, attendees should be able to:

- Recognize the leadership essentials for great teams.
- Comprehend the importance of the “how’s” and “what’s” for leaders of any team.

DAZED AND CONFUSED ABOUT INVESTING IN YOUR PRACTICE? DON'T BE!

Mr. Charles Cohen

Clinicians' practices are their biggest and best investment opportunity. Yet, during their career, most dentists make the same critical mistakes when investing in their business. The key to smarter investment decisions is a strategic practice investment plan that takes the dentist through the arc of their career. Building a plan enables clinicians to take advantage of the right opportunities, maximize their return on investment, and improve the quality of their dentistry. Here's the good news: creating a plan isn't difficult and it's never too late to start. Clinicians only need an overall vision for their practice and career, a few hours and a little coaching. Using case studies, participants will learn how a long-term plan focused on the three central inputs (skills, technology and facility) positively impacts a dentist's personal and professional bottom line. More importantly, a proactive plan can help every dentist achieve his or her financial and business potential—as well as Zen-like happiness.

Upon completion of this course, attendees should be able to:

- Create a strategic investment plan and execute the first steps of that plan.
- Calculate the return on investment for key practice purchases.
- Use debt as a practice builder appropriately and without losing sleep.

Please select either the 2-hour session or two 60-minute sessions on the registration form.

THE 4 DISCIPLINES OF EXECUTION: ACHIEVING THE WILDLY IMPORTANT

Mr. Jeffery Downs

The 4 Disciplines exist for one reason—to carry out a plan in the midst of the whirlwind of interruptions. Many people are so busy simply maintaining the business or family—just keeping their heads above water—that they struggle to execute on the most important priorities. The 4 Disciplines focuses the team or family energy on a winnable game in the midst of distraction.

Upon completion of this course, attendees should be able to:

- Acquire a highly effective process for executing goals.
- Implement the 4 Disciplines in their practice, business or personal life.

HOW TO NEGOTIATE PRACTICE AND OTHER IMPORTANT OFFICE LEASES AND SAVE THOUSANDS OF DOLLARS

Mr. Lewis Gelmon

Knowledge is king when negotiating a lease. Lewis Gelmon offers a highly charged and interactive educational experience where practitioners learn straightforward leasing guidelines that are essential to protecting their practices. Mr. Gelmon will demonstrate how to negotiate a lease effectively by explaining the common tenant pitfalls and how to avoid them.

Upon completion of this course, attendees should be able to:

- Perform actionable steps to better interpret their office leases.
- Understand the seven practical and effective leasing guidelines every dentist must know.
- Utilize strategies to communicate effectively with their landlord and save money.

EFFECTIVE NEGOTIATIONS: TOOLS AND TACTICS FOR GAINING THE EDGE IN LIFE

Dr. George Lucas

Negotiations are everywhere—on the job, with friends and family members, in the community and most certainly when traveling. In this workshop, attendees will learn how to interpret negotiation tendencies in every part of their life and how those tendencies can vary role to role. Attendees will also learn how to avoid the consequences of taking the bully approach when they must go competitive.

Upon completion of this course, attendees should be able to:

- Evaluate the different roles in their life that can be enhanced by improved negotiation skills.
- Apply collaborative and competitive negotiation tactics when required.

SATURDAY

January 24, 2015

TAKING CHARGE OF YOUR PRACTICE AND PERSONAL LIFE!

Mr. Pinhas Adar

The biggest challenge for business owners is leveraging time—staying focused, disciplined and motivated so they can be more productive with less stress. During this session, attendees can expect to learn how to discover their true passion, identify and master personal success, and better control their life. Mr. Adar will address how to stop feeling frustrated with the speed of progress, or getting stuck, stagnant, distracted and defeated.

Upon completion of this course, attendees should be able to:

- Formulate a plan to safeguard against the enemy of their productivity.
- Avoid feeling apprehensive, overwhelmed and stressed out when taking on projects.

CREATE A STRONG BRAND: FOCUS ON PATIENT EXPERIENCE

Mr. Richard Laube

This session highlights the essential elements of building a strong, recognizable brand in the patient's mind. This is much more than emblazoning a logo across printed materials, marketing campaigns and the practice website. Developing a sound, recognizable brand is about creating patient experiences that are consistently favorable, both inside and outside the office. Drawing on his years of experience developing brands for Nestlé, Procter & Gamble and Nobel Biocare, Mr. Laube will explain the critical importance of positive patient experiences and their effect on branding.

Upon completion of this course, attendees should be able to:

- Create a strong brand by focusing on the patient's experience.
- Understand that a brand is not what the provider wishes to communicate, but what the patient experiences.



Pinhas Adar



Lou Shuman



Richard Laube

CASE STUDY: STRATEGIES FOR OVERTAKING THE COMPETITION

Dr. Andy Boynton

This course will feature a case study of a CEO launching his new strategy to overtake competitors in a challenging market. Dr. Boynton will highlight the firm's challenges and include a video of the CEO introducing his extremely successful strategy at the firm's annual planning retreat. The discussion will focus on keys to successful strategy formulation, implementation and leadership that are relevant for any size practice or business.

Upon completion of this course, attendees should be able to:

- Utilize the key steps to successful strategy.
- Understand their patients' most important needs.

MAXIMIZING PRACTICE VISIBILITY THROUGH SOCIAL MEDIA AND SEO

Dr. Lou Shuman

The greatest impact to the dental practice recently has not been a new dental procedure or a new product, but the impact the Internet is having on dentistry. Though the modern Internet is more than a decade old, the transformation from informational focus to social interaction has forever changed the retail and service industries. In dentistry alone, 314 million consumers searched for dental knowledge and dental practice selections this year. Companies are popping up daily professing expertise, and social media channels are growing at breakneck speeds. Each technology is constantly redefining itself as it heads down the track, leaving most of us back at the station. Dr. Shuman will help attendees determine how and where to spend time and energy marketing and how to use this technology to acquire new patients and build loyalty.

Upon completion of this course, attendees should be able to:

- Utilize the most up-to-date and effective SEO (search engine optimization) tools to maximize visibility.
- List which social media changes in 2015 they will need to address to maintain a strong online presence.
- Implement tips learned to work effectively with their social media company.



Samuel Smiley

PRACTICE SUCCESS THROUGH OVERHEAD CONTROL AND INCREASED PATIENT FLOW

Dr. Samuel Smiley

With a track record of attracting an average of 70 new patients per month for the last 30 years, Dr. Smiley will offer concrete, proven ways for general dentists to attract new patients to their practice. He will also discuss strategies to increase doctor and hygiene production while controlling the four major components of overhead cost—payroll, rent, laboratory fees and supplies.

Upon completion of this course, attendees should be able to:

- Discover simple methods to increase their number of new patients.
- Put into action new strategies to reduce practice overhead.

ARE YOU BEING TAKEN TO THE CLEANERS, OR ARE YOU CLEANING UP IN YOUR HYGIENE DEPARTMENT?

Dr. Robert Margeas

During this session, Dr. Margeas will share the methodology behind the successful hygiene incentive program he offers his staff. In Dr. Margeas' view, compensation should be based on performance and not the local hourly wage, raises should be based on merit and not just a yearly increase and each hygienist in the practice may have a different pay scale. This course will help determine if hygienist compensation is fair when trying to implement a profitable hygiene program.

Upon completion of this course, attendees should be able to:

- Create a bonus program that is a win-win for the clinician and hygienists.
- Determine fair compensation and have over 20 years of free raises.



Robert Margeas

SATURDAY

Directors Session

DIGITAL MARKETING: UNDERSTANDING AND ENHANCING RETURN ON INVESTMENT

Mr. Ian McNickle

During this session, Mr. McNickle will review the essential elements of a marketing program for specialists. He will share strategies for successfully tracking results and how to measure return on investment. Case studies will be utilized to demonstrate the primary learning objectives.

Upon completion of this course, attendees should be able to:

- Track their marketing results and measure their return on investment.
- Implement the basic components of a dental marketing program.

THE ART, SCIENCE AND BUSINESS OF CLINICAL IMPLANT PRACTICE: PRECISION, PRODUCTIVITY AND PROFITABILITY

Dr. Paul Fugazzotto

In today's economic climate, it's more important than ever to have a profit strategy in an implant practice. Dentists are now able to offer previously undreamt of reconstructive clinical outcomes to their patients. The challenge is how to best translate these possibilities to the patient and perform such ideal therapy in the context of clinical practice. Dr. Fugazzotto will share proven approaches in sustaining practice growth to predictably accomplish these goals.

Upon completion of this course, attendees should be able to:

- Utilize progressive therapies to ensure the financial success of the practice.
- Identify and meet the challenges of continued practice growth and profitability.

REVERSING THE FLOW: HOW YOU CAN BECOME THE REFERRAL SOURCE

Dr. Lee Sheldon

The changing dental environment creates a great opportunity for specialists. Many patients who need the most care have abandoned dentistry because of multiple dental failures due to poor diagnosis and/or treatment. While dentistry is being "dumbed down" by marketplace factors, the largest and wealthiest segment of our population is still looking for experts who can solve their major dental needs. Dr. Sheldon has successfully transitioned his practice from a referral practice to a primary care implant and periodontal practice. In this program, he will show attendees how they can become the "primary care specialist" through a carefully crafted dental experience by a well-trained team, combined with public relations and marketing.

Upon completion of this course, attendees should be able to:

- Choose a method by which the specialist can capitalize on their level of expertise to market to the general public.
- Understand the concept of "positioning."

MAKING MARKETING PERSONAL

Dr. Jason Stoner

Anyone can pick up a book on marketing and read complicated strategies on targeting, analytics, metrics and ROI (return on investment). The challenge is distilling this information into a personal marketing plan. Developing a successful strategy for marketing a practice doesn't have to be difficult or time intensive. This presentation will introduce three easy systems that have been consistently used by Dr. Stoner to great effectiveness. He will also demonstrate the essence of marketing that has proven to be extremely rewarding to him, both personally and professionally.

Upon completion of this course, attendees should be able to:

- Customize their own marketing plan to best fit their practice.
- Apply three concepts that have created a top one percent practice.



Jason Stoner

“Where most referral programs fail is the lack of an effective plan, ongoing consistency and measurement of results.”

– Mr. Ian McNickle



Paul Fugazzotto



Ian McNickle



Lee Sheldon

Speaker Biographies

Mr. Pinhas Adar

Pinhas Adar arrived in the United States at age 22, with one bag, 300 dollars, a handful of English words, not knowing anyone and ready to work hard for his dreams and goals. With commitment, extreme determination and hard work he became a leading dental professional not only within his skill set but also with his ability to communicate with others. Mr. Adar had a burning desire to make a difference in the world by excelling in his field of dentistry and by helping people do the same. For over 36 years he has studied the secrets, principles, impact and psychological effects on consumers and has applied this knowledge in his own life with extraordinary results. A lifelong student of learning how the “greats” have become so, he has been inspired to teach others around the world his passion in life design, communication skills and other strategies to help others believe in themselves and accomplish greatness.

Mr. Simon T. Bailey

Simon T. Bailey is a leadership catalyst and author whose expertise equips emerging leaders and organizations with tips, tools and techniques on how to unleash their potential. He is the former sales director of the world-renowned Disney Institute and founder of Brilliance Institute, Inc. Mr. Bailey has been cited by *Meetings and Conventions* magazine as “one of the best keynote speakers ever heard or used,” and as one of the top 25 “hot speakers” shaping the profession by *Speaker Magazine*. He is the author of seven books including *Release Your Brilliance: The 4 Steps to Transforming Your Life*, *Revealing Your Genius to the World*, which was ranked number 17 of the Top 100 books being read by Corporate America and his new book, *Shift Your Brilliance—Harness the Power of You, Inc.*, a call to action that invites readers to shift their thinking, creating a disruption from the norm that ignites innovation, increasing accountability and profitability in life and business. Mr. Bailey holds an MA from Faith Christian University, is a graduate of the Rollins College Executive Management Certificate Program and lives in Windermere, Florida with his family.

Dr. Andy Boynton

Andy Boynton is dean of the Carroll School of Management, housed within Boston College. Prior to joining Boston College, Dr. Boynton was a professor of strategy at the International Institute for Management Development (IMD) in Lausanne, Switzerland for 10 years. His newest book, *The Idea Hunters: How to Find Great Ideas and Make Them Happen* is co-authored with Bill Fischer. Dr. Boynton earned his MBA and PhD at the Kenan-Flagler School of Business in Chapel Hill, North Carolina. He has served on the faculty at the Kenan-Flagler School of Business and the Darden School of Business, University of Virginia.

Mr. Darrell Cain

Darrell Cain is president of Cain, Watters & Associates, P.L.L.C., a “fee only” certified public accounting firm located in Dallas, Texas. He has designed financial plans for approximately 1,400 dental professionals across the country to help them take advantage of their earning power. Cain, Watters & Associates, P.L.L.C., also provides tax and accounting services, ongoing financial monitoring, investments solutions, practice valuations and transitions and estate planning for their financial counseling clients. Mr. Cain received his BBA and MPA from Baylor University in Waco, Texas. He is a member of the Texas Society of Certified Public Accountants and is a registered investment advisor with the Securities and Exchange Commission. Additionally, he is a certified valuation analyst.

Mr. Charles Cohen

Charles Cohen is managing director and third-generation partner at Benco Dental Company, the nation’s largest independent dental distributor. Benco, headquartered in Northeastern Pennsylvania, has been named one of Pennsylvania’s “Best Places to Work” for 10 of the last 11 years.

Mr. Jeffery Downs

Jeffery Downs is one of FranklinCovey’s practice leaders in the *4 Disciplines of Execution*. He specializes in working with executive teams in both private and public organizations to execute on their top strategies and goals. Mr. Downs has had numerous years of executive leadership experience and record-breaking results. He has consulted with companies such as Intel, Boston Scientific, MSNBC.com, Medica, Collective Brands, Staples Promotional Products, Ottobock and many more. Each of these companies continues to experience tremendous success implementing and using the *4 Disciplines of Execution*. He has been married for 22 years to his sweetheart, Jami, and is the proud father of seven children between the ages of 2 and 19 years old.

Dr. Paul Fugazzotto

Paul Fugazzotto received his DDS from New York University in 1979 and his certificate in periodontology from Boston University in 1981. Dr. Fugazzotto has published over 85 articles in refereed journals; textbooks entitled *Preparation of the Periodontium for Restorative Dentistry*, *Implant and Regenerative Therapies: A Guide to Decision Making and Periodontal-Restorative Interrelationships: Ensuring Clinical Success*; numerous textbook chapters; and a monograph entitled *Guided Tissue Regeneration: Maximizing Clinical Results*. Dr. Fugazzotto lectures on a regular basis on the topics of interdisciplinary care, periodontics, implants, regenerative therapy, aesthetics and practice growth. He is a fellow with the International Team of Oral Implantology, editor in chief of *Implant Realities*, and past study club coordinator for the United States ITI.

Mr. Ken Futch

Ken Futch is president of Ken Futch and Associates, an Atlanta-based training company that teaches organizations and individuals how to recognize and capitalize on opportunities. Before founding his company in 1986, Mr. Futch was in sales and management with AT&T, where he was recognized for achieving the best results in a group of 6,000 salespeople. His success led to his selection as a top trainer at AT&T’s prestigious National Sales School and to being featured in *Newsweek* magazine. He earned his BS in business administration from the University of North Carolina at Chapel Hill. He was commissioned as a lieutenant and served three years in the United States Army, including a tour in Vietnam as a combat platoon leader. A past president of the Georgia Speakers Association and a former Toastmasters International humor champion, he delivers more than 100 high-impact programs annually. He is the author of the book, *Take Your Best Shot*, which is filled with priceless insights and stories about turning situations into opportunities. He is a passionate believer in lifelong learning and has continued his own development by earning the designation of Certified Speaking Professional from the National Speakers Association.

Mr. Lewis Gelmon

Lewis Gelmon is the first person to provide lease negotiation education for dentists. He has educated countless dental audiences and negotiated thousands of leases for dentists in the past 20 years. His background in commercial lease negotiations—first as a shopping center lease negotiator and then as vice president of real estate for one of the world’s largest multi-unit chains—provided Mr. Gelmon with the insight and skill to develop effective strategies for dentists entering into lease negotiations with a landlord.

Mr. Jordan Goodman

Jordan Goodman is “America’s Money Answers Man” and a nationally recognized expert on personal finance. He is a regular guest on numerous radio and television call-in shows across the country, answering questions on personal financial topics. He appears frequently on *The View*, *Fox News Network*, *Fox Business Network*, *CNN*, *CNBC* and *CBS* evening news. For 18 years, Mr. Goodman was on the editorial staff of *Money* magazine, where he served as Wall Street correspondent. While at *Money*, he reported and wrote on virtually every aspect of personal finance. In addition, he served as weekly financial analyst on *NBC News at Sunrise* for nine years and the daily business news commentator on *Mutual Broadcasting System’s America in the Morning Show* for eight years. He is the author or co-author of 13 best-selling books on personal finance including *Master Your Debt*, *Fast Profits in Hard Times*, *Everyone’s Money Book*, *Master Your Money Type*, *Barron’s Dictionary of Finance and Investment Terms* and *Barron’s Finance and Investment Handbook*. He has also written six special focus editions of *Everyone’s Money Book* on *College*, *Credit*, *Financial Planning*, *Real Estate*, *Retirement Planning* and *Stocks, Bonds and Mutual Funds*. Mr. Goodman is also a speaker and seminar leader on personal finance topics for business executives, students, associations, investment clubs, employees and others.

Mr. Tim Greaves

Tim Greaves is a partner at Cain, Watters & Associates, P.L.L.C., a “fee only” certified public accounting firm located in Dallas, Texas. He has designed financial plans for hundreds of dental professionals across the country that help each client take advantage of their earning power. Mr. Greaves received his BBA in accounting in 1991. He is a member of the Texas Society of Certified Public Accountants, American Institute of Certified Public Accountants and is a registered investment advisor with the Securities and Exchange Commission. Prior to joining CWA, he spent four years at the international public accounting firm of PricewaterhouseCoopers LLP. There, he performed the audit manager role on a publicly traded multinational manufacturing company and coordinated and reviewed the audit work performed by other PricewaterhouseCoopers LLP offices, both domestically and internationally. Additionally, Mr. Greaves performed the audit manager function on various middle market companies. In the last several years, he has been lecturing on a national level to various dental societies, study clubs and dental associations.

Mr. Richard Laube

Richard Laube is the chief executive officer of Nobel Biocare and executive advisor of Roark Capital Group. He served as chairman of Laboratoires Innéov SNC, The Gerber Life Insurance Company, Jenny Craig Affiliated Companies, Life Ventures S.A., and Nutrition-Wellness Venture AG. He was chief executive officer and vice president of Nestlé Nutrition at Nestlé S.A., and held a very successful career in the consumer products sector of Procter & Gamble. He also served as brand manager of Procter & Gamble AG, Cincinnati and Geneva, Switzerland as well as marketing director of Procter & Gamble do Brasil, vice president and general manager of Procter & Gamble, Darmstadt, Germany and Procter & Gamble, Pharmaceutical, São Paulo and as president of Roche Consumer Health. He studied for his MA and BA in organizational development and evaluation research at Boston University from 1974 to 1979, completing his education at Fort Lee public schools in Fort Lee, New Jersey.

Mr. Steve LeFever

Finance equals boring. For Steve LeFever, this equation doesn’t work. With a superior command of his subject material, he makes finance compelling, interesting and funny. His unique ability to take complex topics and translate them into plain English separates him from the crowd. He has a rare skill of being able to motivate business owners and advisors to enthusiastically explore the financial workings of a business and change the areas that need changing. He will make you believe that finance is not boring; instead you’ll agree with him when he says, “Finance is fun!” Part comedian, part financial manager, former commercial banker, current entrepreneur and 100 percent world-class presenter, Mr. LeFever drives home his message with a no-nonsense, laugh-out-loud approach that makes him a top-rated presenter. For over 20 years, he has combined humor and practical knowledge in hard-hitting, substantive presentations. He is an internationally recognized author and advocate for independent business. His book, *Profit Mastery: Knowledge-Driven Financial Performance* has sold over one million copies. Mr. LeFever has traveled widely, and the Profit Mastery program has been presented on three continents in eight languages over two decades to hundreds of thousands of business owners, managers, commercial bankers, accountants and business coaches.

Dr. Roger Levin

Roger Levin is a third-generation general dentist and the chairman and CEO of Levin Group, Inc., the largest dental practice consulting firm in North America. As a leading authority on dental practice management and marketing, he has developed the scientific systems-based consulting method that will increase practice production and profitability while lowering stress. Dr. Levin presents more than 100 seminars per year and is a keynote speaker for major dental conferences. He has authored 65 books and more than 3,700 articles. Dr. Levin sits on the editorial boards of five prominent dental publications, serves as the practice management editor of *Compendium* and is managing editor of *Dental Business Review*. He is also a regular contributor to the *Journal of the American Dental Association* and has been interviewed by *The Wall Street Journal*, *The New York Times* and *Time* magazine. Levin Group is headquartered in Baltimore, Maryland, with offices in Phoenix, Arizona and Marseille, France.

Dr. Donald Lewis, Jr.

Donald Lewis, Jr., earned the designation of Certified Fraud Examiner (CFE) from the Board of Regents of the Association of Certified Fraud Examiners. He is a highly sought after speaker on the subject of white-collar crime and has presented seminars to healthcare professionals, accountants and legal professionals across the United States and Canada. He is a diplomate of the American Board of Oral and Maxillofacial Surgery, a professor of oral and maxillofacial surgery at Case Western Reserve University School of Dental Medicine and the chairman and originator of the American Association of Oral and Maxillofacial Surgeons Committee on Software Development and Computer Technology. He is currently in private practice in Cleveland, Ohio and in his spare time, is a high school basketball official.

Dr. George Lucas

George Lucas has been active in business education, executive development and organizational consulting since the early eighties. His primary areas of expertise include sales, business-to-business negotiation skills, business development, marketing strategy and leadership skills. Dr. Lucas received his BA, MBA and PhD from the University of Missouri-Columbia, and subsequently served in the field sales positions with American Supply Corporation and Pitney Bowes. Dr. Lucas has held business school faculty positions at both Texas A&M and at The University of Memphis. He was recognized as one of the top professors in the executive and international MBA programs. He is the author and co-author of several successful books including *The One Minute Negotiator* with Don Hutson, now a “National Best Seller” in the *New York Times*, *The Wall Street Journal* and *USA Today*. In 2014, he launched *Mastering Negotiation Skills*, a four-course, 34-chapter interactive learning experience with US Learning VT and produced a similar program with Western CPE for continuing education credits for CPAs.

Dr. Robert Margeas

Robert Margeas graduated from the University of Iowa College of Dentistry in 1986 and completed his AEGD residency the following year. He is currently an adjunct professor in the Department of Operative Dentistry at the University of Iowa, diplomate of the American Board of Aesthetic Dentistry, a fellow of the Academy of General Dentistry and International Team of Oral Implantologists, and a member of many dental organizations including The American Academy of Restorative Dentistry and The American Academy of Esthetic Dentistry. He is board certified by the American Board of Operative Dentistry and has written numerous articles on aesthetic and implant dentistry. Dr. Margeas lectures and presents hands-on courses internationally and serves on the editorial advisory board of *Inside Dentistry* and *Compendium*. He is also a contributing editor to *Dentistry Today* and *Oral Health* in Canada. He also maintains a full-time private practice focusing on comprehensive restorative and implant dentistry in Des Moines, Iowa.

Dr. Kelly McGonigal

Kelly McGonigal is a health psychologist and lecturer at Stanford University who works at the intersection of neuroscience and the latest advances in understanding the mind-body connection. She is passionate about translating cutting-edge research from psychology, neuroscience and medicine into practical strategies for health, happiness and personal success. She teaches a wide range of programs at Stanford University and has received a number of awards for her undergraduate psychology courses, including Stanford University’s highest teaching honor, the Walter J. Gores Award. Dr. McGonigal is a founding member of the Yoga Service Council, serves on the advisory boards of several non-profit organizations bringing yoga and meditation to underserved and at-risk populations. She has also authored two books, *The Neuroscience of Change* and *The Willpower Instinct*.

Mr. Ian McNickle

Ian McNickle is a nationally recognized marketer, writer and speaker. He is a partner at WEO Media, a national dental marketing firm where he leads their sales, marketing and business development activities. Under his leadership WEO Media has grown to become one of the leading dental marketing firms in the country. He has developed significant expertise in online marketing, website optimization, search engine optimization (SEO), pay-per-click marketing (PPC), social media, video marketing, referral marketing, online reputation management, marketing strategy and related topics. Mr. McNickle has a BS in mechanical engineering from Washington State University where he was also a graduate of the University Honors Program. In addition, he graduated cum laude with an MBA from the University of Washington.

Ms. Erica Olsen

Erica Olsen is the COO and a co-founder of OnStrategy, a company founded on the belief that strategic planning should not be relegated to just the Fortune 500s of the world. Every organization, no matter the size or resources, can benefit from being more strategic. For over a decade OnStrategy has partnered alongside management teams in virtually every industry across the globe. Ms. Olsen is responsible for developing the format and the user interface for the award-winning OnStrategy online strategic management system and is the author of *Strategic Planning Kit for Dummies*, 2nd Edition.

Mr. Bob Salvin

Bob Salvin is the founder and CEO of Salvin Dental Specialties, Inc., a North Carolina-based manufacturer of surgical instrumentation and biomaterials for implant dentistry. Starting from the trunk of a used car in 1981, he has built a business with global brand recognition, now doing business in over 110 countries. Mr. Salvin is an alumnus of North Carolina State University, the Strategic Coach Program and the Center For Creative Leadership. He is a past president of the Charlotte World Trade Association and the Metrolina Business Council. He is the recipient of the Gateway International Trade Award, the North Carolina Governor’s International Trade Award and the Seattle Study Club® Charlie English Community Education Award. He is also an Ernst & Young Entrepreneur of the Year Award Winner. In addition to Salvin Dental, Mr. Salvin serves on the boards of Clarion Research Group, a Pennsylvania-based biotech company, and Lancer Orthodontics, a California-based orthodontic company.

Mr. Mike Scott

Mike Scott believes that any time invested in training must provide information that has immediate and applicable take-home value. Leverage of “information-to-application” is what he stresses. Mr. Scott uses his in-depth knowledge of training, employee development and business to help professionals quickly and fully absorb and utilize the information he teaches. He earned his BS in business and his MA in psychology at North Dakota State University in Fargo, North Dakota before serving as a United States Army officer in Vietnam. Returning alive, he vowed to use his success in teaching others the art of creating the totally accountable life—by always keeping your word and not surprising people with non-performance. He started his highly successful consulting and training company over 20 years ago after a rewarding career in the world of business. He has worked with over 2,500 companies like McDonald’s, Ernst & Young and State Farm Insurance helping them raise their revenues and profits by just showing them how to enhance their levels of accountability. Small changes—huge payoffs.

Dr. Lee Sheldon

Lee Sheldon is a private practice periodontist in Melbourne, Florida. He is a former Seattle Study Club® director who won the 1997 Rookie of the Year award. His practice has developed a charitable giving campaign, which has generated nearly \$140,000 for local charities. Throughout much of his career, he has contributed to local media in his area, having hosted two long-running television and radio programs, and is a regular columnist for *Florida Today*. Dr. Sheldon is proud to have his son Matthew, a general dentist, practice right along side with him. They are the authors of the book, *The Ultimate Mouth Manual*, 2nd Edition, which helps educate patients on how they can wisely choose their dentist. Dr. Sheldon has also written a book with his office manager, Danyel Joyner, specifically for periodontists, *The Perio Dilemma, How to Thrive Now!*

Dr. Lou Shuman

Lou Shuman is the president of Pride Institute, a renowned practice management institute and is known for his expertise in Internet strategy, strategic relations, emerging technologies, digital marketing methods and operational practice management. He is the past owner of a 10-doctor private group practice where he specialized in adult orthodontics. He received his DMD and certificate in Advanced Graduate Studies in orthodontics from the Henry M. Goldman Boston University School of Dental Medicine. Dr. Shuman is a member of the key opinion leader board at DENTSPLY GAC, a personal executive consultant to DENTSPLY GAC and a member of the DENTSPLY technology committee. He is also an executive consultant for Propel Orthodontics, HR for Health and Sesame Communications, the chairman of the Sesame Communications Technology Advisory Board, a member of the clinical advisory boards and editorial boards at *Dentistry Today*, *Dental Products Report*, *Dental Practice Report*, *The Progressive Dentist*, *Orthodontic Practice US*, *The Progressive Orthodontist*, as well as the managing editor of *Dental Sleep Practice Magazine*. He is the only dentist who has been selected both as a “Top CE Leader in Dentistry” and a “Leader in Dental Consulting” by *Dentistry Today* magazine.

Mr. John Sileo

John Sileo is the CEO of The Sileo Group, a privacy think tank that helps organizations protect the data that drives their profits. Mr. Sileo’s identity was illegally used to embezzle \$300,000 from his clients. The exposure destroyed his career and consumed two years of his life as he fought to stay out of jail. Combining real-world experience with years of study, Mr. Sileo became an award-winning author, trusted advisor and leading speaker on technology, information and privacy protection. His body of work includes engagements with the Pentagon, *USA Today*, Blue Cross, the FDIC, Pfizer, *60 Minutes*, Homeland Security and many other organizations of all sizes. Mr. Sileo graduated from Harvard University and spends his free time snowshoeing the Rocky Mountains with his remarkable wife and two high-spirited daughters.

Mr. Greg Slayton

Greg Slayton has over 20 years of sales and management experience in the dental industry. Immediately after college and prior to entering the business world, he spent five years with the Charlotte police department, serving as a field-training officer for rookie police officers. He also served in the United States Army Reserves for six years before receiving an honorable discharge. Mr. Slayton is a vice president and minority partner in Salvin Dental, and is responsible for the recruiting, hiring and training of the entire sales team. He is responsible for ensuring the quality of the total customer experience. He is an alumnus of the University of North Carolina-Charlotte, the Harvard Business School Management Development Program and the Strategic Coach, a three-year focusing program for successful entrepreneurs. He is active in his church and serves as the committee chair for Young Life for urban communities in Charlotte.

Dr. Samuel Smiley

Samuel Smiley is a practicing general dentist in Dublin, Ohio. He established his practice in 1986 and currently has two partners. He graduated from The Ohio State University College of Dentistry in 1984 and completed the Kellogg School Executive Management Program at Northwestern University in 2008. Dr. Smiley served on the board of directors for Huntington Bank Insurance and has served on boards reviewing professional loans for Sky Bank and Prospect Bank. He is a past president of the Dublin Chamber of Commerce and a founding member of Dublin AM Rotary Club. He was selected as Dublin Business Person of the Year, chaired the Dublin Fund of the Columbus Foundation and has served on the advisory board of Dublin Schools as well as Dublin Parks and Recreation. Dr. Smiley is a fellow of the Academy of General Dentistry and the International College of Dentists, a member of the Pierre Fauchard Academy and Academy of Operative Dentistry and currently volunteers his time at the Columbus Zoo providing dental care for the gorillas.

Dr. Jason Stoner

Jason Stoner is one of the top periodontists in Columbus, Ohio. He received his DDS from The Ohio State University in 1997. Immediately following dental school graduation, Dr. Stoner gained entrance to the prestigious Ohio State University Graduate Periodontology Program for residency training, where he received a certificate of periodontics in 2000. Concurrent with residency training, Dr. Stoner also graduated from The Ohio State University Graduate School with an MS in oral pathology and oral medicine. During residency he also received two scholarships from the American Cancer Society for his research in oral cancer. Following training, Dr. Stoner traveled to Charlotte, North Carolina for a one-year associateship concentrating on dental implant and aesthetic periodontal therapies. In 2002, he opened Stoner Periodontic Specialists in Dublin, Ohio and later opened an additional branch in New Albany, Ohio in 2005.

Mr. Tim Twigg

Tim Twigg is the president of Bent Ericksen & Associates, the leading authority in human resources and personnel management in the healthcare industry, helping dentists successfully deal with the ever-changing and complex labor laws. Mr. Twigg brings over 30 years of practice management and business consulting experience specifically in the healthcare field. His expertise extends to leadership and business development, strategic planning and marketing, and communication skills. He has presented seminars nationally on practice management, human resources and employment compliance. He is the past president and a member of the Academy of Dental Management Consultants and a member of the Speaking Consulting Network, the Society for Human Resources Management and VetPartners, the professional consulting association for the veterinary industry.

Mr. Dan Wicker

Dan Wicker is a partner in charge of operations at Cain, Watters & Associates, P.L.L.C., a “fee only” certified public accounting firm located in Plano, Texas. Mr. Wicker has designed financial plans for hundreds of healthcare professionals across the country that help each client take advantage of their earning power. Cain, Watters & Associates, P.L.L.C., also provides tax and accounting services, ongoing financial monitoring, practice valuations and transitions and estate planning for their financial counseling clients. Mr. Wicker oversees the financial planning process as well as the CWA planners among other operational responsibilities. He has served the clients of CWA in all financial planning roles including the development of financial plans, tax planning and practice valuations. Mr. Wicker is a graduate of Kansas State University, holds a CPA and Personal Financial Specialist license from the AICPA and is a registered investment advisor. He also maintains memberships in the AICPA and the Texas Society of Certified Public Accountants.

The Fine Print

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

SYMPOSIUM PASSPORT

Provides access to all presentations shown in the program grid found on pages 2-3 and all social programming, including four breakfasts, four lunches, two dinners and all late night entertainment events.

Payment received on or before October 15, 2014:

\$3195 per doctor

\$2495 per accompanying spouse, guest or staff (non-doctor)

Payment received after October 15, 2014:

\$3395 per doctor

\$2695 per accompanying spouse, guest or staff (non-doctor)

KIDS PASSPORT

Provides access to four breakfasts, four lunches and two dinners. Kids may attend entertainment events at their parents' discretion.

\$1695 per child, 16-18 years old

\$1295 per child, 11-15 years old

\$695 per child, 6-10 years old

No charge per child, 0-5 years old

CANCELLATION POLICY

Written notice of cancellation must be sent by certified mail to the Seattle Study Club® office at 635 Market Street, Kirkland, WA 98033 on or before the dates shown below to be effective. (Cancelled registrants are not entitled to receive Symposium materials and gifts, books, bags, apparel or any other items that may be provided to the attendees.)

By November 16, 2014:

\$200 retained, remainder refunded.

November 17–December 3, 2014:

50% credited toward the 2016 Symposium, remainder retained.

After December 3, 2014:

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.



WHEN & WHERE

Wednesday-Saturday, January 21-24, 2015 at The Ritz-Carlton, Amelia Island, Florida. Special discounted rates have been arranged with The Ritz-Carlton and are available on a first come, first served basis. Be sure to reference the group name Seattle Study Club® at the time of booking to receive the reduced rate. Please understand that in exchange for these exclusive room rates, a non-refundable deposit equal to four nights' room rental (plus taxes and fees) will be charged at the time of your booking. To make your reservation, call the hotel directly at 866.763.2960.

Coastal View Room:	\$299
Ocean View Room:	\$379
Ocean View Suite:	\$549
Ocean Front Suite:	\$599
Club Coastal View:	\$599
Club Ocean View:	\$649

You are responsible for your own room and other charges at the hotel. Please be sure you understand the hotel's written policy regarding reservation changes and consider travel insurance if snow or bad weather may affect your travel plans.



Saturday night performer Allen Stone

REGISTRATION

This is a lecture, slide and peer discussion-based program suitable for all dentists and business professionals regardless of prior experience. Register online, by mail or fax, or contact Ms. Carla Kimball at the Seattle Study Club® office to register by phone.

Seattle Study Club
Ms. Carla Kimball
635 Market Street
Kirkland, WA 98033
Phone: 425.576.8000
Fax: 425.827.4292
Email: carla@seattlestudyclub.com
Online: 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 social functions). Your registration is not confirmed without full payment in advance.

SPEAKER & ACTIVITY SUBSTITUTIONS

This brochure represents the speakers and activities that have been booked at the time of publication; however, speaker or activity cancellations occasionally occur, for reasons beyond our control. In the event of such an occurrence, we may substitute another speaker or activity or make a change to the schedule, without giving prior notice.

UP TO 27.5 CREDITS AVAILABLE



Academy of General Dentistry
Approved PACE Program Provider
FAGD/MAGD Credit
Provider ID: 300136

Approval does not imply acceptance by a state or provincial board of dentistry or AGD endorsement. Term approval: 10/1/2011 to 9/30/2015

ADA C·E·R·P® | Continuing Education Recognition Program

Seattle Study Club, Inc., is an ADA CERP Recognized Provider (11/2010 to 12/2014). ADA CERP is a service of the American Dental Association to assist dental professionals in identifying quality providers of continuing dental education. ADA CERP does not approve or endorse individual courses or instructors, nor does it imply acceptance of credit hours by boards of dentistry. Concerns or complaints about a CE provider may be directed to the provider or to ADA CERP at www.ada.org/cerp. Seattle Study Club, Inc., designates this activity for up to 27.5 continuing education credits.

DISCLOSURE OF COMMERCIAL SUPPORT

The Symposium is funded in part by tuition and in part by unrestricted sponsorship funds from Nobel Biocare, Brasseler USA, 3M ESPE, CareCredit, Benco Dental, Carestream Dental LLC, Accelerated Practice Concepts, Inc., Biolase Technology, Isolite Systems, DSN Software, Millennium Dental Technologies, Inc., Cain, Watters & Associates, P.L.L.C., Whip Mix Corporation, Harris Biomedical, Central Data Storage, FranklinCovey, Heartland Payment Systems, My Dental Hub and gIDE Global Institute for Dental Education. As a result, The Seattle Study Club, Inc., The Seattle Study Club Journal, Inc., and/or Dr. Michael Cohen and Suzanne Cohen receive a direct or indirect financial benefit from the listed companies. Some speakers have current or past commercial affiliations (such as receiving research grants, speaking engagements, travel reimbursements, honoraria, etc.) with the companies shown below.

Mr. Pinhas Adar: Founder and CEO of Adar Dental Network and Adar Success Academy

Mr. Darrell Cain: Cain, Watters & Associates, P.L.L.C., and FMR

Mr. Jeffery Downs: FranklinCovey

Mr. Richard Laube: CEO of Nobel Biocare

Mr. Steve LeFever: Chairman and founder of Business Resource Services, Inc., DBA Profit Mastery

Mr. Ian McNickle: WEO MEDIA Dental Marketing and Communications

Mr. Bob Salvin: CEO and majority owner of Salvin Dental Specialties

Dr. Lou Shuman: Sesame Communications

Symposium Doctor Registration

Please complete and fax to 425.827.4292, register online at www.seattlestudyclub.com or mail to:
Seattle Study Club® | 635 Market Street | Kirkland, WA 98033

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 in *The Fine Print* located on page 24 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.

Name: _____

[circle one] GP OS Perio Prosth Ortho Endo Lab

Other: _____

Study Club Name: _____

Are you an advisor for your study club? [circle one]: Yes No

Your Office Address: _____

City: _____ State/Province: _____

Postal Code: _____ Country: _____

Office Phone: _____

Fax: _____

Cell Phone: _____

Email: _____

Special Dietary Requirements [please specify]: _____

Your meal preference, should there be a plated meal [check one]:

Beef Chicken Fish Vegetarian Vegan

Doctor Tuition:

\$3195, on or before October 15, 2014

\$3395, after October 15, 2014

Total Payment Enclosed: _____

Amex/Disc/MC/Visa: _____

Exp: _____ CVS#: _____ Or Check #: _____

Name on Card: _____

Billing Address: _____

City: _____ State/Province: _____

Postal Code: _____ Country: _____

BREAKOUT SESSION SELECTIONS

Wednesday, January 21

Please select one 3-hour session OR two 90-minute sessions below.

3-hour sessions:

THE FINANCIAL SCORECARD / Mr. Steve LeFever

ASSOCIATE TO PARTNER / Mr. Dan Wicker

90-minute sessions:

LEADERSHIP / Mr. Simon T. Bailey

MARKETING IN A COMPETITIVE ENVIRONMENT / Dr. Roger Levin

STRATEGIC PLANNING / Ms. Erica Olsen

ACCOUNTABILITY / Mr. Mike Scott

Thursday, January 22

Please select one 3-hour session OR two 90-minute sessions below.

3-hour sessions:

BUILDING YOUR FINANCIAL LEGACY / Mr. Tim Greaves

PROFIT MASTERY: BREAK-EVEN 360° / Mr. Steve LeFever

90-minute sessions:

EMPLOYEE EMBEZZLEMENT AND FRAUD / Dr. Donald Lewis, Jr.

STRATEGIC PLANNING / Ms. Erica Olsen (Repeat from Wednesday)

SELECTING TOP PERFORMERS / Mr. Bob Salvin and Mr. Greg Slayton

EMPLOYMENT LAW AND COMPLIANCE / Mr. Tim Twigg

Friday, January 23

Please select the 2-hour session OR two 60-minute sessions below.

2-hour session:

DATA SPIES, HACKERS AND INTERNET ATTACKERS / Mr. John Sileo

60-minute sessions:

HIGH PERFORMANCE TEAMWORK / Dr. Andy Boynton

INVESTING IN YOUR PRACTICE / Mr. Charles Cohen

THE 4 DISCIPLINES OF EXECUTION / Mr. Jeffery Downs

HOW TO NEGOTIATE OFFICE LEASES / Mr. Lewis Gelmon

EFFECTIVE NEGOTIATIONS / Dr. George Lucas

Shirt Size [circle one]: Male: S M L XL XXL

Female: S M L XL XXL

I am staying at: The Ritz-Carlton, Amelia Island, Florida

Other: _____

Symposium Registration *Accompanying Spouse, Guest or Staff (Non-Doctor)*

Please complete and fax to 425.827.4292, register online at www.seattlestudyclub.com or mail to:
Seattle Study Club® | 635 Market Street | Kirkland, WA 98033

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 in The Fine Print located on page 24 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.

Name: _____

[circle one] Coordinator Guest Partner/Spouse Staff: _____

Other: _____

Home Address: _____

City: _____ State/Province: _____

Postal Code: _____ Country: _____

Home Phone: _____

Fax: _____

Cell Phone: _____

Personal Email: _____

Special Dietary Requirements [please specify]: _____

Your meal preference, should there be a plated meal [check one]:

Beef Chicken Fish Vegetarian Vegan

Accompanying Spouse, Guest or Staff Tuition:

\$2495, on or before October 15, 2014

\$2695, after October 15, 2014

Kids Tuition:

\$1695, ages 16-18 Name: _____

\$1295, ages 11-15 Name: _____

\$695, ages 6-10 Name: _____

Free, ages 0-5 Name: _____

Total Payment Enclosed: _____

Amex/Disc/MC/Visa: _____

Exp: _____ CVS#: _____ Or Check #: _____

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Shirt Size [circle one]: Male: S M L XL XXL

Female: S M L XL XXL

I am staying at: The Ritz-Carlton, Amelia Island, Florida

Other: _____

**HELLO
OUR NAMES ARE**

*Ali, Brittany, Carla, Cheryl, Greg, Heather,
Jane, Janell, Kristi, Lisa, Mary, Michael,
Michelle, Miki, Shaida & Suzanne*

Dedicated to Dr. Morton Amsterdam

SEATTLE STUDY CLUB®
Cultivating Excellence in Comprehensive Dentistry