

# Straight Talk on Practice Transitions

## Date:

Saturday, August 26, 2023

## Time:

8:30 am Registration  
9:00 am—4:00 pm Program

## Location:

St. Louis Marriott West  
660 Maryville Centre Drive  
St. Louis, Missouri 63141

## Presenters:

Guy Jaffe, ADS Midwest  
Jim Ackerman, ADS Midwest  
Patrick Gunn, Gunn & Gunn  
Brian McCook, Anders CPAs + Advisors  
Merella Schandl, Anders CPAs + Advisors  
Patrick Shaw, Provide

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Attend the course that comes  
just once a year!

## Description of Course

This course is intended for dentists considering a practice transition. It is our goal to give you a broad overview of the process by examining how to prepare your practice for sale, the legal issues involved in a purchase agreement, the tax consequences of selling your practice, raising fees through insurance negotiations, and how a dental practice sale is financed.

## Educational Goals and Objectives

The purpose of this lecture presentation is for you to learn valuable information about many of the significant issues involved in a dental practice transition. At the end of the seminar, you will have a better understanding of the total transition process. Some of the topics that will be discussed are:

- ◆ Transition Options
- ◆ Critique Your Practice
- ◆ Magnitude of Student Debt
- ◆ Buyer's Due Diligence
- ◆ Understanding the Marketplace for Selling and Identifying Today's Buyers
- ◆ Methods of Determining the Value of a Dental Practice
- ◆ How to Protect the Practice in Case of Disability or Death
- ◆ Practice Financing with Rising Interest Rates
- ◆ The Role of a CPA in a Dental Practice Sale
- ◆ Tax Consequences of a Dental Practice Sale
- ◆ Allocating the Sales Price for Tax Purposes
- ◆ Purchase Agreements for a Dental Practice Sale
- ◆ Transferring Personal Goodwill
- ◆ The Importance of Covenant Not to Compete
- ◆ Negotiating Insurance Fees to Raise Valuations
- ◆ Credentialing Buyers

## —REGISTRATION FORM—

Name \_\_\_\_\_  DDS  DMD

Address \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Home/Cell Phone \_\_\_\_\_ Email Address \_\_\_\_\_

Will your spouse attend?  Yes  No If yes, spouse's name \_\_\_\_\_

State and License # \_\_\_\_\_ AGD Member # \_\_\_\_\_

**REGISTRATION FEE:** Dentist \$250 Spouse \$75

*The registration fee includes course material, continental breakfast, refreshments, and lunch. The fee is payable by check and must accompany registration. Cancellations made one week prior to the program date will incur a \$50 processing fee and the remainder of the registration fee will be refunded.*

For additional information, or to register, contact **Jim Ackerman** at **314-449-4517**

**MAKE CHECK PAYABLE AND MAIL TO:**

ADS Midwest  
194 Emerald Green Ct  
St. Louis, MO 63141



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