

Dental Financial Planning: Turning Chaos into Financial Freedom



While dentistry is one of the most lucrative career paths, many dentists struggle to build financial security and meet their life goals.

Dentists receive the training and knowledge to provide quality care for their patients, yet they are not usually equally trained in managing the financial aspects of the dental practice. Many dentists approach retirement age with little to show for decades of hard work. By following a dental-specific game plan, dentists can grow and retain more of their dental practice profits to accelerate their financial independence.

Wes Read, CPA, CFP® shares how dentists can work smarter, organize their business and personal finances, and build the life they desire. We will learn a step-by-step process that simplifies the path to financial freedom. From funding their future, eliminating debt, reducing taxes, and planning for retirement, attendees will explore a comprehensive strategy for navigating their financial future. They will discover how to calculate what Wes calls their “life goals breakeven.” They will explore the skills and experience to look for and what to avoid when selecting a financial advisory team. Attendees will leave with practical, purposeful strategies that, when implemented, lead to financial independence and greater quality of life.



WES@PRACTICECFO.COM
WWW.PRACTICECFO.COM
WWW.WESREAD.COM
858-877-9446

Learning Objectives:

- Discover a holistic, simplified strategy for achieving financial freedom
- Define your individual financial goals and start with the end in mind
- Explore proven solutions for everything from taxes and financial analysis to investments and retirement plans
- Learn to calculate the necessary practice collections to meet life goals
- Understand factors to look for in selecting your team of advisors
- Avoid the setbacks that prevent you from scaling your wealth

SUGGESTED AUDIENCE:

Dentists

SUGGESTED FORMAT:

Full or Partial Day;
Lecture, Workshop, Keynote

OPTIONAL COURSE CONTENT:

Tax Planning

Learn how to plan effectively to reduce your tax liability and retain more of your profits.