# Understanding Practice Transition Options: Sorting Through the Truth, Lies, Opportunities and Threats

*About the Speaker*

## SCOTT CLYNCH

**SATURDAY, JANUARY 28, 2023 • 8:00AM - 5:00PM**
**SAN FRANCISCO AIRPORT MARRIOTT WATERFRONT**
**1800 OLD BAYSHORE HIGHWAY, BURLINGAME, CA 94010**

**Scott is an alumnus of Texas Tech University, with a Bachelors of Science and Masters of Science in accounting and taxation. He joined CWA in 2013 after three years with Ernst and Young, where he was a senior in tax compliance. His tax background is extremely valuable to the clients he passionately serves.**

**Scott encourages and educates his clients along each step of their long-term plan and finds satisfaction in helping them realize their financial potential. He is an experienced leader in the practice transition process, presenting at the CWA Practice Transition Seminars to help educate dental practice owners in the buying and selling process. He also mentors for the 3 to1 Foundation teaching students about the values of savings, investing and accumulating wealth.**

New industry trends, inflation and tax policy changes are dramatically impacting the dentistry business; coupled with the increase in private equity offers, there's a lot being thrown at dental practice owners. When the time is right, you must decide how to maximize the largest asset you own — your practice.

Dental practice partnerships and transition opportunities are not just about dollars and cents. This lecture presents information on how to create a successful partnership that is fair and equitable to both parties. It illustrates what doctors need to know about the significant tax advantages a transition can have for both the buyer and the seller, offering the potential for a win-win situation.

During times of uncertainty and opportunity, it's more important than ever to have a financial plan that can guide you toward your goals. Participants will receive a thorough outline of data points to analyze when contemplating a private sale or private equity offer. By understanding the true value of a dental practice, they will walk away equipped to look at offers skeptically and gain realistic expectations of a practice transition.

### COURSE OBJECTIVES

- Learn the step-by-step process that produces successful and equitable partnerships.
- Understand how private equity or a DSO values the EBITDA of the dental practice.
- Create a personal and business financial plan that will position your practice to maximize its value when the time is right.

### REFUND AND CANCELLATION POLICY

- If you are NOT an AGD member and register as one, you'll need to re-register as a Non-member to get into any California AGD courses. If your AGD Membership has expired, you can renew here: https://www.agd.org/join-agd/online-application.
- Registrations are subject to a $50 non-refundable processing fee.
- Cancellations made by email prior to 1/7/23 will receive a refund less the $50 processing fee.
- Cancellations made after 1/7/23 are completely non-refundable.
- Transfer of a registration to another name will be considered by email request through 1/7/23.

### REGISTRATION

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| $149 | AGD/Delta Dental Members to attend LIVE in-person *(includes continental breakfast and lunch)* |
| $300 | Non-members to attend LIVE in-person *(includes continental breakfast and lunch)* |
| $99 | AGD/Delta Dental Members to attend via Zoom |
| $199 | Non-members to attend via Zoom |

**8 CE (lecture)**

**AGD subject code: 550 Practice Management**

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