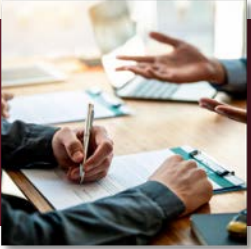




BOB AFFLECK
SEAMLESS DENTAL TRANSITIONS

Speaker Packet

PRESENTATIONS



PRACTICE TRANSITIONS MADE SIMPLE:
Buy, Grow and Get More Value When You Sell
Develop the business foundation and establish a thriving practice to improve value, profitability and a smooth transition.



EXIT STRATEGY MADE SIMPLE: How to Navigate and Get More Value When You Sell Your Practice
Plan ahead and consider all of your options as you prepare to exit the practice.



PRACTICE OWNERSHIP MADE SIMPLE:
Purchase or Start-Up with Confidence
Learn the various types of and key considerations as you take your first step toward practice ownership.

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PRACTICE TRANSITIONS MADE SIMPLE: Buy, Grow and Get More Value When You Sell

Purchasing or selling a dental practice? How you transition the practice will make all the difference.

Purchasing, owning, and transitioning a dental practice can have long-term implications and challenges if not done properly, such as determining its value, team and patient retention, tax planning and a successful transition. Without proper planning, transition strategies will be ineffective and lead to suboptimal outcomes. In fact, both buyers and sellers fail to fully understand how to fully optimize their practice value during a transition.

In this presentation, Bob Affleck shares proven protocols drawn from over three decades helping thousands of dentists through their practice transition. Attendees will understand the various types and key considerations in a practice transition. They will receive processes, resources, and a step-by-step action plan to guide them through buying, partnering, developing, retiring, and/or selling a dental practice. Emphasis is given to developing the business foundation and establishing a thriving practice to improve value, profitability and a smooth transition.



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LEARNING OBJECTIVES

- Begin with the end in mind, setting goals and a timeline for transition
- Identify the business management strategies that successful, thriving practices employ
- Receive a detailed proven step-by-step plan for practice growth
- Understand what to look for in assessing practice value and financial standing
- Analyze the pros and cons between private sale vs DSO sale
- Explore steps into dental practice purchase: Search, Evaluate, Offer & Finance
- Examine steps in preparing for transition of your practice: Value, Plan, Readiness for the Market
- Acknowledge considerations of the transition aftermath: managing team, systems, patients and potential pitfalls
- Maximize retirement planning: options, security, practice value
- Learn to lead with confidence and greater impact
- Discover how to generate a collaborative culture that drives success and team satisfaction

SUGGESTED AUDIENCE:
Dentists and Practice Owners

SUGGESTED FORMAT:
Partial Day;
Lecture, Workshop, Keynote

LEARNING OBJECTIVES

- You've got options! Explore which one is right for you
- Assess the pros and cons of selling privately vs. DSO
- Explore a proven step-by-step process to maximize practice value
- Evaluate financial preparedness: Options, Security, Maximize Practice Value
- Understand how to create a positive transition plan for you, the buyer, your team, and patients
- Examine steps in preparing for the transition: Value, Plan, Readiness and Market
- Determine the steps in selling your dental practice: Market, Vet, Negotiate, Close
- Receive a reality check and what to expect when selling your practice to anyone
- Illuminate alternative exit strategies, beyond selling or retiring, including liquidation, partnerships, and mergers

SUGGESTED AUDIENCE:

Dentists and Practice Owners

SUGGESTED FORMAT:

Partial Day;
Lecture, Workshop, Keynote

EXIT STRATEGY MADE SIMPLE: How to Navigate and Get More Value When You Sell Your Practice

Unsure how to maximize your practice value or know where to seek guidance?

Whether retiring or selling your practice, it is important to plan ahead and consider all of your options as you prepare to exit the practice. In this presentation, Bob Affleck shares proven protocols drawn from over three decades helping thousands of dentists through their practice transitions.

Attendees will receive processes, resources, and a step-by-step action plan to guide them through the process of retiring and/or selling a dental practice. Emphasis is given to developing the business foundation and nurturing a thriving practice to improve value and transition success.

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OPEN
for **BUSINESS**

PRACTICE OWNERSHIP MADE SIMPLE: Purchase or Start-Up with Confidence

Looking to own a dental practice, but unsure whether to buy or start from scratch?

Acquisitions, mergers, start-ups and partnership - which one is right for you? All will have long-term implications and challenges if you're guessing your way through the process.

In this presentation, Bob Affleck shares proven protocols drawn from over three decades helping thousands of dentists through their practice transition. Attendees will learn the various types of and key considerations as you take your first step toward practice ownership. They will receive processes, resources and a step-by-step action plan to guide them through the process. Learn how to immediately set your new practice up for success, increasing profitability and building a strong foundation for future growth.



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LEARNING OBJECTIVES

- Begin with the end in mind; explore vision, mission & values
- Explore steps into dental practice purchase: Search, Evaluate, Offer and Finance
- Learn a proven 8 step process to ensure success in buying or starting up
- Determine the demographics of the “right fit” practice
- Illuminate what to look for when assessing practice value and financial standing
- Remove the guesswork in finding the right lender; not all are equal
- Acknowledge considerations of the transition aftermath: managing team, systems, patients, and potential pitfalls.
- Discover how to create a positive transition for your new team and patients
- Understand how necessary it is creating the culture day one
- Explore the services to add which, when implemented, cultivate instant revenue growth
- Evaluate the pros and cons of a private sale vs. DSO

SUGGESTED AUDIENCE:

New Dentists and Existing Practice Owners

SUGGESTED FORMAT:

Partial Day;
Lecture, Workshop, Keynote

MEET BOB

Dental transitions, whether it's buying, selling, partnering or exiting practice, can be complex and challenging for dentists due to factors such as financial considerations, legal implications and managing team and patient expectations.

For more than three decades, Bob Affleck has helped dentists realize their dream of practice ownership, growth and success. Through his efforts, he has successfully transformed the lives of thousands of dentists, enabling them to leave behind a lasting legacy that they can be proud of. From practice finance specialist to practice management consultant and even a practice broker, Bob now serves as an advisor and educator for dentists.

To address the significant disparity between what dentists learned in dental school and the knowledge required to operate their own practice, Bob helped to close that gap through his educational programs 'Dental MBA Business Series' and 'Pathway to Practice Ownership.' Speaking at dental meetings across the country, Bob is a frequent contributor to the educational programs of dental societies, study clubs, and dental schools. He is recognized as an influencer by peers and clients and is a frequent guest on industry podcasts.

Bob is a true connector. He is enthusiastic about giving back to this beloved industry and the most gratifying aspect of his work with dental professionals has been the relationships forged over time.



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Presentations *(Partial Listing)*

American Dental Association
American Student Dental Association *(multiple)*
Dental Study Clubs *(multiple)*
Loma Linda University
Orange County Dental Society
Reducing Insurance Dependence Academy
Roseman University
San Diego Dental Society
San Fernando Valley Dental Society
San Francisco Dental Society
San Mateo Dental Society
Santa Clara County Dental Society
Southern Alameda County Dental Society
Tri County Dental Society
University of California Los Angeles
University of California San Francisco
University of the Pacific
University Southern California
Western University of Health Sciences