

We dream of a secure retirement when work is optional. Why not take action today to turn your dreams into a reality!



Dr. Pat Little is one of the best speakers I have encountered. He lectures with information gleaned from first-hand experience as a private practice dentist, accountant and fraud examiner. His information is tangible to every dental practice owner.

Dr. Mike Munn
Grand Strand Dental Society

We dream of a secure retirement when work is optional. Why not take action today to turn your dreams into a reality! Implementing the proper financial planning fundamentals are the keys in achieving a secure financial future.

The first step is to learn how to manage debt, maintain liquidity, protect assets through appropriate insurance (professional and individual), and guard against identity theft. The second step is to generate surplus income that can be invested for future goals. Finally, we need to grow our assets to last a lifetime and beyond.

Accomplishing these goals require knowledge, discipline and proper financial planning. Learn the basic fundamentals of asset protection, debt management, investment strategies and wealth creation. While ideal for those just starting their financial journey, seasoned investors can also benefit from this fundamental review.

COURSE OBJECTIVES

- Understand debt management, credit score fundamentals and identity theft avoidance
- Utilize proper insurance management for individual and professional protection
- Explore options for college, retirement and succession planning
- Learn the various investment types and their advantages and disadvantages
- Examine asset allocation, rebalancing and risk reduction techniques

Suggested Format:

Half-day, Full-day, After-dinner, Keynote

Audience: Ideal for the entire dental team

