



### PRACTICE TRANSITIONS

We specialize in seamless dental practice transitions, offering comprehensive services for buying or selling. Our programs ensure **fair and equitable** transactions while confidentially matching buyers and sellers with suitable opportunities.



### PRACTICE MERGERS

Discover valuable information and services for merging two or more dental practices. This transformative process has the potential to **boost practice profits by an impressive 25-60%**. By focusing your investment on your expertise in dentistry, you can safeguard your economic future and security, avoiding the uncertainties of the stock market.



### PRACTICE EVALUATIONS

Our practice evaluations involve a thorough market value analysis, considering factors such as location, facility, equipment, assets, practice maturity, staff experience, financial performance, management systems, patient composition, growth potential, referred procedures, and more. **Equally important is the allocation of practice value for tax purposes, optimizing tax considerations.**



### EARNED EQUITY ACQUISITION PROGRAMS

Our program **maximizes the income potential of existing practices** by optimizing facility usage. It offers young practitioners a chance to minimize risks while achieving equity in the practice, rather than being hired associates.



### PARTNERSHIPS, ASSOCIATESHIPS, & OFFICE SHARING ARRANGEMENTS

With a proven track record of successful practice transitions, we excel in recommending comprehensive and fair business arrangements. **Our creative and innovative approach** enables us to develop unique and advantageous programs for everyone involved. By utilizing Deferred Compensation for existing shareholders and Pre-Tax Dollars for the Purchaser, we ensure economic benefits and security for all parties.

# Legacy Services Suite



## TAX & FINANCIAL ANALYSIS

Through a focused evaluation of your federal income tax structures, profit and loss statements, and relevant financial data, we can identify potential savings. With strategic planning, significant amounts of money can be saved by creatively structuring your business entities. We assess factors such as professional corporations, equipment LLCs, and real estate LLCs to optimize your financial arrangements.



## LEGACY PROTECTION PLAN

Ensure the growth, retirement, and financial planning of your dental practice by knowing its current fair market value through our proactive Legacy Protection Plan (LPP). Designed to address expected and unexpected life events, the LPP safeguards your practice and legacy, providing a comprehensive solution for retirement, death, or disability. Enroll in the LPP today to protect your practice value and secure your future.



## DSO CONSULTING SERVICE

Dental services organizations (DSOs) can be an attractive option for dentists looking to ease the burden of managing a practice. Our team of experts can help you navigate the financial details of a deal and identify the risks of predatory terms. Whether you are considering selling to a DSO or have already been approached by a company, we are here to help you make informed decision regarding the direction of your practice.



## ASSOCIATE PLACEMENT PROGRAM

Our Associate Placement Program is a powerful tool to help connect doctors with opportunities – both for the host doctor seeking new associates and doctors seeking an ideal associate position. Our team of knowledgeable consultants can provide valuable guidance during this exciting step in your career.