

Indianapolis District Dental Society Seminar

Transitioning Your Dental Practice: Setting Yourself up for Success!

Indiana Convention Center

500 Ballroom - 100 South Capital Avenue, Indianapolis, IN 46225

Saturday, February 25, 2023

12:30 p.m. – 3:30 p.m.

(immediately following the IDDS Dental Networking Seminar)

Cost is: \$25/per member and \$50/per nonmember.

Transitioning Your Practice:

These presentations will provide information on some of the questions you may have as a practicing dentist looking to transition your practice in the next 5-10 years.

Selling Doctors – What to Expect

- Options for Selling
- What a Buyer is going to look for
- Getting Your Practice “Sell Ready”
- Selling Doctors Transition Plan
- Winding Down Your Practice

Legal Aspects of a Practice Transition

- Legal Agreements & the Transition
- Structure of the Transaction and Documentation
- Business Entities
- Real Estate

Marketing Your Practice to Associates, Partners and Buyers

- Effective Practice Marketing
- Equipment Investment Strategies
- Functionality Testing

Planning for What Happens Next – Retirement

- How much do I need to retire comfortably?
- How should I adjust my portfolio in preparation for retirement?
- How do I prepare for healthcare costs in retirement?
- How do I decide which retirement income sources to take and when?

Preparing for an Unexpected Event

- In the event of death, what needs to happen at the practice and individual level
- Legally, Accounting/Taxes, Financially, Clinically & Operationally



Guest Speakers

Amber Banks, MW Banks Consulting, LLC

Michael Carson, Hurlow Wealth Management Group, Inc.

Joe Massa, Legacy Practice Transitions

RSVP by Thursday, February 23, 2023 at (317) 471-8131, info@indydentalsociety.org, or scan the QR code above.