

# Dykema's 9th Annual Definitive Conference for DSOs

## Agenda

**WEDNESDAY, JULY 13, 2022**

**TUSK Partners Workshop (Breakfast and lunch provided.)**

7:00 AM – 8:00 AM	TUSK Workshop Registration and Breakfast
8:00 AM – 4:00 PM	Workshop Sessions (Lunch served from Noon to 1:00 PM)
4:00 PM	Workshop Concludes
3:00 PM – 7:00 PM	Dykema DSO Conference Registration and Information Desk Open <i>Proudly Sponsored by Vivos Therapeutics</i>
3:00 PM – 6:00 PM	Champagne Welcome <i>Proudly Sponsored by Caber Hill</i>

## Women in DSO Velocity Event

*Proudly Sponsored by Henry Schein and Henry Schein ONE*

4:00 PM – 4:40 PM	Networking
4:40 PM – 4:45 PM	Welcome Message – Brian Colao
4:45 PM – 5:00 PM	Women in DSO Updates – Dr. Aman Kaur
5:00 PM – 5:15 PM	Dr. Rania Saleh, Founder, Oryx Dental
5:15 PM – 5:30 PM	Kim Diamond, VP of MultiSite and Customer Delivery, Henry Schein
5:30 PM – 6:00 PM	Networking and Reception

**6:00 PM – 7:00 PM**      **Dykema DSO Conference Kick-Off Reception**  
*Proudly Sponsored by Ally Lending*

**7:00 PM – 10:00 PM**      **Wednesday Dinner Under the Stars**  
*Proudly Sponsored by Covered Care*

# THANK YOU SPONSORS



# Dykema's 9th Annual Definitive Conference for DSOs

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### THURSDAY, JULY 14, 2022

- |                            |   |
|----------------------------|---|
| <b>7:00 AM – 7:00 PM</b>   | <b>Registration and Information Desk Open</b><br><i>Proudly Sponsored by Vivos Therapeutics</i>   |
| <b>7:00 AM – 8:00 AM</b>   | <b>Morning Yoga on the Lawn</b><br><i>Proudly Sponsored by Elliott Davis</i>  |
| <b>8:00 AM – 6:00 PM</b>   | <b>Professional Headshot Studio Open</b><br><i>Proudly Sponsored by Gen4 Dental Partners</i>  |
| <b>8:00 AM – 6:00 PM</b>   | <b>Relax and Recharge Lounge Open</b><br><i>Proudly Sponsored by Patterson Dental</i>   |
| <b>8:00 AM – 9:00 AM</b>   | <b>Breakfast</b><br><i>Proudly Sponsored by Videia Health</i>   |
| <b>9:00 AM – 9:30 AM</b>   | <b>DSO Difference Makers – Presented by the Dykema DSO Group</b><br>Brian Colao, Director of the Dykema DSO Industry Group<br>Zack Hoard, Member, Dykema<br>Virgil Ochoa, Member, Dykema<br>Eric White, Member, Dykema<br>Craig Woods, Member, Dykema   |
| <b>9:30 AM – 9:45 AM</b>   | <b>Jeff Civillico – Conference Emcee</b><br><i>Proudly Sponsored by Tab32</i>   |
| <b>9:45 AM – 10:30 AM</b>  | <b>Lessons Learned from Billion-Dollar DSOs</b><br>Pat Bauer, President and CEO, Heartland Dental<br>Bob Fontana, Chairman and CEO, Aspen Group<br>John (J.) Hedrick, CEO, Smile Doctors Support Services<br>Jerry Rhodes, CEO, Dental Care Alliance<br>Moderator: Amol Nirgudkar, CEO, Patient Prism       |
| <b>10:30 AM – 11:00 AM</b> | <b>Break &amp; Networking</b><br><i>Proudly sponsored by CareStack</i>  |
| <b>11:00 AM – 11:30 AM</b> | <b>The New Frontier in DSO Operations</b><br>Heidi Arndt, Founder and CEO, Evolve Dental Advisors<br>Dr. Scott Leune, Founder and CEO, Breakaway Practice<br>Rondi Michaux, Director of Corporate Development, 42 North Dental<br>Brooke Young, COO, Espire Dental<br>Moderator: Zack Hoard, Member, Dykema |

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### THURSDAY, JULY 14, 2022 (Continued)

- 11:30 AM – 12:00 PM      The New Frontier in Private Equity Investments**  
Brad Coppens, Senior Managing Director, InTandem Capital Partners  
Mark Dorman, Managing Director, Endeavour Capital  
Ellie Naderi, Operating Partner, Latticework Capital  
Steele Windle, Principal, Five Points Capital  
Moderator: Craig Woods, Member, Dykema
- 12:00 PM – 12:30 PM      The New De Novo Frontier**  
Dr. Sulman Ahmed, Founder, Chairman & CEO, DECA Dental Group  
Dr. Saam Zarrabi, Co-Founder and CEO, Rodeo Dental  
Moderator: Brian Colao, Director of the Dykema DSO Industry Group
- 12:30 PM – 2:00 PM      Lunch**  
*Proudly Sponsored by Dental Care Alliance*
- 2:00 PM – 3:30 PM      Breakout Sessions (2 Rotations, 40 Minutes Each)**
- Breakout A: DSO Accounting Panel**  
Mark Rudolph, Shareholder, Elliott Davis  
Mike White, Principal, CLA  
Moderator: Virgil Ochoa, Member, Dykema
- Breakout B: Forward Focused Practice: Tools for Your Future Growth**  
Carrie Webber, Owner & CCO, The Jameson Group  
*Brought to you by SmileDirectClub*
- Breakout C: Modernize your DSO**  
A.J. Peak, CEO, Peak Dental Services  
Amber Collins, COO, Peak Dental Services  
*Brought to you by Abella*
- Breakout D: DSO Lending Panel**  
Angela Baker, VP/Business Development, Wintrust Financial Corporation  
Jamie Mantle, VP- Relationship Manager, Citi  
Mike Montgomery, Senior VP- Healthcare Middle Market Lending  
and Sponsor Finance, Live Oak Bank  
Moderator: Eric White, Member, Dykema
- Breakout E: Bridgework – DSO M&A Mixer**  
Brought to you by E78 Partners

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### THURSDAY, JULY 14, 2022 (Continued)

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|--------------------------|--|
| <b>2:00 PM – 3:30 PM</b> | <b>Breakout Sessions (2 Rotations, 40 Minutes Each)</b><br><br><b>Breakout F: Understanding and Leveraging Real Estate Investment Trusts in your Business Plan</b><br><i>Brought to you by National Dental Healthcare REIT</i><br><br><b>Breakout G: The Single Greatest Breakthrough in Sleep Medicine Since CPAP</b><br>Kirk Huntsman, Chairman and CEO, Vivos Therapeutics<br><i>Brought to you by Vivos Therapeutics</i> |
| <b>3:30 PM – 4:00 PM</b> | <b>Break &amp; Networking</b><br><i>Proudly Sponsored by Cornerstone Dental Specialties</i>  |
| <b>4:00 PM – 4:05 PM</b> | <b>Fireside Chat with PrimaHealth Credit</b><br>Brendon Kensel, Founder and CEO, PrimaHealth Credit<br>Brian Colao, Director of the Dykema DSO Industry Group  |
| <b>4:05 PM – 4:25 PM</b> | <b>Presentation of the Third Annual Dental Titan Award</b><br>Recipient: Stanley Bergman, Chairman and CEO, Henry Schein<br>Presented by Brian Colao, Director of the Dykema DSO Industry Group  |
| <b>4:25 PM – 4:55 PM</b> | <b>The New Frontier in Dental Specialties</b><br>Brett Deaver, SVP/GM Global Partner Network, SmileDirectClub<br>Kirk Huntsman, Chairman and Chief Executive Officer, Vivos Therapeutics<br>Lamonte Jensen, Chief Executive Officer, Gen4 Dental Partners<br>Thomas von Sydow, Chief Operations Officer, Cornerstone Group<br>Moderator: Virgil Ochoa, Member, Dykema  |
| <b>4:55 PM – 5:25 PM</b> | <b>The New Buy-Side Frontier</b><br>Houmam Ali, COO, Guardian Dental Partners<br>Jordan DiNola, CEO, SGA Dental Partners<br>David Pegg, Chief Development Officer, Dental Care Alliance<br>Lane Theriault, CEO, Independence Dental Services<br>Moderator: Eric White, Member, Dykema  |
| <b>5:25 PM – 5:55 PM</b> | <b>The New Frontier in Dental School Collaboration</b><br>Dr. Barouir (Barry) Deirmenjian, CEO, Smiles West<br>Dr. Lisa Nguyen, Associate Director for Community-Based Clinical Education, UCLA School of Dentistry<br>Dr. Wilhelm (Bill) Piskorowski, Associate Dean of Community-Based Clinical Education, UCLA School of Dentistry<br>Moderator: Brian Colao, Director of the Dykema DSO Industry Group                   |

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### THURSDAY, JULY 14, 2022 (Continued)

- 5:55 PM – 6:25 PM**      **The Impact of Women in Leadership – Presented by Women in DSO**  
Julie Booher, Chief Strategy Officer, PepperPointe Partnerships  
Shawna Eury, Divisional VP, Florida, Dental Care Alliance  
Nancy Lanni, VP of Healthcare Services, Henry Schein  
Amber Nish, CMO, Community Dental Partners  
Sarah Sharfstein, VP of Category Development & Strategy, Aspen Dental  
Moderator: Dr. Aman Kaur, Founder and President, Women in DSO  
and CEO, AiM Dental Alliance
- 6:25 PM – 7:10 PM**      **Celebrity Keynote Speaker – Olympic Gold Medalist Lindsey Vonn**  
Co-Interviewer: McKenzie Fagan, Sales Manager, Strategic Accounts, Henry Schein ONE  
Co-Interviewer: Samantha Glucksman, Director of Sales, Strategic Accounts, Henry Schein  
*Proudly sponsored by Sunbit*
- 7:10 PM – 11:00 PM**      **Dykema DSO Reception and Party (Featuring the Spazmatics!)**  
*Reception proudly co-sponsored by SmileDirectClub and membersy*
- Drone Show Tonight! (2 Viewings)**  
*Proudly co-sponsored by Henry Schein, Henry Schein ONE, and Thurston Group*

### FRIDAY, JULY 15, 2022

- 8:00 AM – 1:30 PM**      **Registration and Information Desk Open**  
*Proudly Sponsored by Vivos Therapeutics*
- 8:00 AM – 9:00 AM**      **Breakfast**  
*Proudly Sponsored by Medix Dental IT*
- 8:00 AM – 1:00 PM**      **Professional Headshot Studio Open**  
*Proudly Sponsored by Gen4 Dental Partners*
- 8:00 AM – 2:00 PM**      **Relax and Recharge Lounge Open**  
*Proudly Sponsored by Patterson Dental*

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### FRIDAY, JULY 15, 2022 (Continued)

- 9:00 AM – 9:30 AM**      **Lessons From Middle-Market CEOs**  
Emmet Scott, Co-Founder and CEO, CDP, and President, ADSO  
Geoffrey Ligibel, President and CEO, 42 North Dental  
A.J. Peak, CEO, Peak Dental Services  
Moderator: Brian Colao, Director of the Dykema DSO Industry Group
- 9:30 AM – 10:00 AM**      **The New Sell-Side Frontier**  
Kevin Cumbus, Founder and President, TUSK Partners  
Kurt Harvey, Managing Director, Caber Hill Advisors  
Ajeya (AJ) Shekar, Director, Provident Healthcare Partners  
Moderator: Craig Woods, Member, Dykema
- 10:00 AM – 10:30 AM**      **Lessons from Non-Control and other Minority Investments in DSOs**  
Robbie Isenberg, Managing Director, Clairvest Group Inc.  
Rahil Manji, Investor, Clairvest Group Inc.  
Moderator: Eric White, Member, Dykema
- 10:30 AM – 11:00 AM**      **Motivational Speaker – Michigan State University  
Basketball Coach Tom Izzo**  
*Proudly sponsored by PrimaHealth Credit*
- 11:00 AM – 11:30 AM**      **Break & Networking**  
*Proudly Sponsored by Overjet*
- 11:00 AM – 11:30 AM**      **Grab-and-Go Lunch (to enjoy during our final panels!)**  
*Proudly sponsored by Callbox and GoTo Connect*
- 11:30 AM – 12:00 PM**      **Innovative Patient Financing Approaches to Drive Growth**  
Jay Letwat, VP of Dental, Sunbit  
Ken Rees, CEO, Covered Care  
Andrew Swan, Lending Account Executive, Ally Lending  
Erik Svensen, Global Consumer Financing, DentsplySirona  
Moderator: Sean Buckley, Member, Dykema
- 12:00 PM – 12:30 PM**      **A Live Podcast with Dr. Mark Costes**  
Dee Fischer, CEO, Fischer Professional Group  
Margaret McGuckin, Co-Founder and Principal, i3 Ignite  
Dr. Charles Moser, Executive Coach and MAP Implementer, DEO  
Moderator: Dr. Mark Costes, Founder and CEO, DSI

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### FRIDAY, JULY 15, 2022 (Continued)

- 12:30 PM – 1:00 PM      Technological Innovation in the DSO Space**  
Rand Schulman, CEO/Chairman, DMscore  
Ophir Tanz, Founder and CEO Pearl  
Moderator: Brian Colao, Director of the Dykema DSO Industry Group
- 1:00 PM – 1:30 PM      The New Frontier in Growing Your Organization**  
Dr. Kent McBride, Partner, NADG and  
Founding Partner, Meridian Dental Specialists  
Dr. Eric Roman, Partner, DEO, and Co-Founder, SmartDiligence.ai  
Moderator: Brian Colao, Director of the Dykema DSO Industry Group
- 1:30 PM – 2:00 PM      The New Frontier in Regulatory Due Diligence**  
Melissa Marquez, COO, Jarvis Analytics  
Harold Gornbein, Founding Partner, Apex Reimbursement Specialists  
Ali Oromchian, Co-Founder and CEO, HR for Health  
Dr. Wayne Silverman, Director of Coding and Compliance,  
Apex Reimbursement Specialists  
Moderator: Zack Hoard, Member, Dykema
- 2:00 PM – 2:30 PM      Best Practices in Cyber Security**  
Tom Barberio, CIO, Thinc Forward  
Patrick Jacobwith, CEO/Partner, Sunset Technologies  
Gary Salman, CEO, Black Talon Securities  
Sean Buckley, Member, Dykema  
Moderator: Virgil Ochoa, Member, Dykema
- 2:30 PM      Conference Concludes**  
Mark your calendars for Dykema's 10th Annual Definitive Conference for DSOs, to be held at the Gaylord Rockies Resort on July 12-14, 2023. Be sure to monitor [DykemaDSO.com](https://DykemaDSO.com) or Dykema DSO's LinkedIn page for all of the latest announcements. See you next year!