

Agenda

WEDNESDAY, JULY 19, 2023

- 7:00 a.m. – 4:00 p.m.** **TUSK Partners Workshop**
(Breakfast and lunch provided. Registration required, no same-day walk-ins.)
Proudly brought to you by Tusk Partners
- 9:00 a.m. – 3:00 p.m.** **Scale Your Dental Practice Bootcamp**
(Breakfast and lunch provided. Registration required, no same-day walk-ins.)
Proudly brought to you by SMC National and Fischer's Professional Group
- 12:00 p.m. – 4:00 p.m.** **Building Blocks of HR Due Diligence Workshop**
(Lunch provided. Registration required, no same-day walk-ins.)
Proudly brought to you by HR for Health
- 12:00 p.m. – 4:00 p.m.** **Dental Tech Discovery Workshop**
(Lunch provided. Registration required, no same-day walk-ins.)
Proudly brought to you by Revere Partners
- 2:00 p.m. – 4:00 p.m.** **ADSO CEO Roundtable**
(Member and invite only.)
- 3:00 p.m. – 7:00 p.m.** **Dykema DSO Conference Registration Desk Open**
Proudly Sponsored by Large Practice Sales
- 3:00 p.m. – 6:00 p.m.** **Champagne Welcome**
Proudly Sponsored by Caber Hill
- 4:00 p.m. – 6:00 p.m.** **Women in DSO Networking Event**
Proudly Sponsored by Henry Schein
- 6:00 p.m. – 7:00 p.m.** **Conference Kick-Off Mixer**
Proudly Sponsored by Dentist Job Connect
- 7:00 p.m. – 10:00 p.m.** **Dinner and Reception Under the Stars**
Proudly Sponsored by Membersy, CareStack and SolutionReach

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THURSDAY, JULY 20, 2023

- 7:00 a.m. – 7:00 p.m.** **Registration Desk Open**
Proudly Sponsored by Large Practice Sales
- 7:00 a.m. – 8:00 a.m.** **Morning Yoga**
Proudly Sponsored by Oakpoint
- 8:00 a.m. – 6:00 p.m.** **Professional Headshot Studio Open**
Proudly Sponsored by Align Technology
- 8:00 a.m. – 6:00 p.m.** **Relax and Recharge Lounge Open**
Proudly Sponsored by GLO Science Professional
- 8:00 a.m. – 9:00 a.m.** **Breakfast**
Proudly Sponsored by Videa Health
- 9:00 a.m. – 9:30 a.m.** **Welcome and DSO Difference Makers Awards**
- 9:30 a.m. – 9:45 a.m.** **Jeff Civillico – Conference Emcee**
Proudly Sponsored by CareCredit
- 9:45 a.m. – 10:15 a.m.** **Keynote: State of the Industry**
Steve Thorne, Founder and CEO, Pacific Dental Services
- 10:15 a.m. – 10:30 a.m.** **Keynote: State of the Industry**
Brian Colao, Director, Dykema DSO Industry Group
Steve Thorne, Founder and CEO, Pacific Dental Services
- 10:30 a.m. – 11:00 a.m.** **Break**
Proudly sponsored by Medix Dental IT
- 11:00 a.m. – 11:30 a.m.** **Industry Perspectives from Industry Leaders**
Guy Amini, President, dentalcorp
Stan Bergman, Chairman of the Board and CEO, Henry Schein
Steve Bilt, CEO, Smile Brands
Dr. Ray Cohlmia, Executive Director, American Dental Association
Moderator: Brian Colao, Director, Dykema DSO Industry Group

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THURSDAY, JULY 20, 2023 (continued)

11:30 a.m. – 12:00 p.m.

Same-Store Growth

Speakers to be announced soon.

12:00 p.m. – 12:15 p.m.

Same-Store Growth Discussion

Speakers to be announced soon.

Moderator: Virgil Ochoa, Member, Dykema

12:15 p.m. – 12:45 p.m.

Key Inflexion Points in the Growth of Your DSO

Bob Fontana, Chairman and CEO, Aspen Dental Group,
and Founder, Aspen Dental

12:45 p.m. – 1:00 p.m.

Growth of Your DSO Discussion

Bob Fontana, Chairman and CEO, Aspen Dental Group,
and Founder, Aspen Dental

Moderator: Zack Hoard, Member, Dykema

1:00 p.m. – 2:00 p.m.

Lunch

Proudly Sponsored by Dental Care Alliance

2:00 p.m. – 3:30 p.m.

Breakout Sessions

Two Rotations: 2:00 p.m. – 2:45 p.m. and 2:45 p.m. – 3:30 p.m.

Breakout A: Burning Questions: Legal

Jim Aldrich, Member, Dykema

Eric Fingerhut, Member, Dykema

Brian Forbes, Member, Dykema

Eric Klein, Member, Dykema

Rich Lieberman, Member, Dykema

Donna McElroy, Member, Dykema

Moderator: Zack Hoard, Member, Dykema

Breakout B: DSO Lending

Angela Baker, Vice President, Business Development, Wintrust

Evan Barker, Commercial Relationship Manager, CapStar Bank

Amine Lahlou, Senior Vice President, Citi Healthcare Specialty

Mike Montgomery, Senior Vice President – Director, DSO Lending,

Live Oak Bank

Moderator: Eric White, Member, Dykema

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THURSDAY, JULY 20, 2023 (continued)

Breakout C: To be announced soon!

Presented by HR for Health

**Breakout D: Leveraging Real Estate Investment
Trusts in Your Business Plan**

Presented by National Dental Healthcare REIT

Jared Elfvin, CFO, National Dental Healthcare REIT

Dallas Margeson, Acquisitions Director, National Dental Healthcare REIT

**Breakout E: Integration: Technology, Financing & Cyber Insurance –
How They Intersect**

Presented by Sunset Technologies

Breakout F: DSO Accounting

Derek Kaulfuss, Principal, Plante Moran

Mark Rudolph, Shareholder and Dental Practice Chair, Elliott Davis

Mike White, Principal, CLA

Breakout G: Patient Financing

Presented by PrimaHealth Credit

Patients are overwhelmed with the cost of care and are delaying treatment. Providers are juggling too many finance partners to get their patients approved for care. Join us to discuss how DSOs can profitably serve most patients including the underserved with one easy-to-use solution.

Breakout H: Measuring Associate Productivity

Dr. Hisham Barakat, Chief Clinical Officer, Guardian Dental Partners

Dr. Jonathan Mason, Co-Founder and Chief Clinical Officer,
Select Dental Management

Dr. Jon Meis, CEO, Smart Choice Dentistry

Moderator: Dr. Charles Moser, Owner, SIMPLE Leadership

3:30 p.m. – 4:00 p.m.

Break

Proudly Sponsored by Birdeye

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THURSDAY, JULY 20, 2023 (continued)

4:00 p.m. – 4:30 p.m.

2023 Dental Titan Award

Proudly Sponsored by U.S. Oral Surgery Management

Moderator: Brian Colao, Director, Dykema DSO Industry Group

4:30 p.m. – 5:00 p.m.

Buy-Side Panel

J. Hedrick, CEO, Smile Doctors

Danny Kawas, CEO, Guardian Dental Partners

David Pegg, Chief Growth Officer, Dental Care Alliance

Lane Theriault, CEO, Independence

Moderator: Craig Woods, Member, Dykema

5:00 p.m. – 5:30 p.m.

Growing Your DSO in 2023: Solving Top 5 Challenges to Ignite Growth

Jeff Koziel, President, Dental Care Alliance

Geoff Ligibel, CEO, 42 North Dental

DeAnn McClain, COO, Heartland Dental

Dr. Cindy Roark, Senior Vice President and CCO, Sage Dental

Moderator: Amol Nirgudkar, CEO, Patient Prism

5:30 p.m. – 6:00 p.m.

Middle-Market DSO

Heidi Arndt, Founder and CEO, Evolve Dental Advisors

Sam Gruenbaum, CEO, West Coast Dental

Mick Janness, CEO, Oakpoint

Lee Provow, CEO, Oak Dental Partners

Moderator: Eric White, Member, Dykema

6:00 p.m. – 6:30 p.m.

Women in DSO Panel

Moderator: Kristin Ornstein, Associate, Dykema

More speakers to be announced soon!

6:30 p.m. – 11:00 p.m.

Dykema DSO Reception and Party

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8:00 p.m. – 8:45 p.m. **Musical Opening Act – The Spazmatics!**
Proudly Sponsored by CLA (CliftonLarsonAllen)

9:00 p.m. – 9:10 p.m. **Colorado’s Largest Drone Show!**
Proudly Sponsored by Patterson Dental

9:10 p.m. – 11:00 p.m. **Headliner Musician: Belinda Carlisle**
Proudly sponsored by Live Oak Bank

FRIDAY, JULY 21, 2023

7:00 a.m. – 11:00 a.m. **Registration Desk Open**
Proudly Sponsored by Large Practice Sales

8:00 a.m. – 12:00 p.m. **Professional Headshot Studio Open**
Proudly Sponsored by Align Technology

8:00 a.m. – 12:00 p.m. **Relax and Recharge Lounge Open**
Proudly Sponsored by GLO Science Professional

8:00 a.m. – 9:00 a.m. **Breakfast**
Proudly Sponsored by Glidewell

9:00 a.m. – 9:30 a.m. **New Innovations for Increasing Same-Store Growth**
Sina Amiri, Vice President of Revenue, Zentist
Nikki Dean, Director of Strategic Accounts, Pearl
Jinesh Patel, Co-Founder and CEO, Uptime Health
Stephen Sweeney, Founder, iCreditWorks

9:30 a.m. – 10:00 a.m. **Lessons from PE investors**
Steve Cohen, Managing Director and General Counsel,
InTandem Capital Partners
Robbie Isenberg, Managing Director, Clairvest Group

10:00 a.m. – 10:30 a.m. **An Interview with Andre Agassi**
Proudly Sponsored by Sunbit

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FRIDAY, JULY 21, 2023 (continued)

10:30 a.m. – 11:00 a.m.

Break

Proudly Sponsored by Overjet

11:00 a.m. – 11:30 a.m.

Sell-Side Panel

Kevin Cumbus, President, TUSK Partners

Kurt Harvey, Managing Director, Caber Hill Advisors

Brannon Moncrief, Principal, CEO, McLerran and Associates

Moderator: Virgil Ochoa, Member, Dykema

11:30 a.m. – 12:00 p.m.

DEO Panel

12:00 p.m. – 12:30 p.m.

Grab-and-Go Lunch

Proudly sponsored by Dentsply Sirona