

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.** **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.** **Women in DSO Advisory Board Meeting**
Mark your calendars for ASCEND, the third annual presentation and networking event led by Women in DSO®, the official nonprofit organization created to empower and advance women in the DSO space. Be among industry's brightest, gain access to key leadership in the dental support industry with the Women in DSO® advisory board, and join the movement to recognize women leaders shaping the industry today. (Member and invite only.)
- 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.** **ASCEND, A Women in DSO Networking Event**
Proudly Sponsored by Henry Schein and Henry Schein ONE
- 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. – 8:00 a.m.** **Morning Yoga**
Proudly Sponsored by Oakpoint
- 8:00 a.m. – 7:00 p.m.** **Registration Desk Open**
Proudly Sponsored by Large Practice Sales
- 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 Remarks and Dental Difference Maker Awards**
Brian Colao, Director, Dykema DSO Industry Group
Zack Hoard, Member, Dykema
Virgil Ochoa, Member, Dykema
Eric White, Member, Dykema
Craig Woods, Member, Dykema
- 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.** **State of the Industry Discussion**
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

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THURSDAY, JULY 20, 2023 (continued)

- 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
- 11:30 a.m. – 12:00 p.m. Key Inflection Points in the Growth of Your DSO**
Bob Fontana, Chairman and CEO, The Aspen Group (TAG)
- 12:00 p.m. – 12:15 p.m. Growth of Your DSO Discussion**
Bob Fontana, Chairman and CEO, The Aspen Group (TAG)
Zack Hoard, Member, Dykema
- 12:15 p.m. – 1:00 p.m. Managing EBITDA in the Current Market Climate**
Presented by Women in DSO
Pat Bauer, President & CEO, Heartland Dental
Dr. Aman Kaur, President, Women in DSO
Terri Krauss, COO, Dental365
Hollie Williams, CFO, Rodeo Dental
Moderator: Kristin Ornstein, Senior Attorney, 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, Senior Counsel, Dykema
Donna McElroy, Member, Dykema
Moderator: Zack Hoard, Member, Dykema

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THURSDAY, JULY 20, 2023 (continued)

Breakout B: DSO Lending

Angela Baker, Vice President, Wintrust Bank -- Professional Practice Group

Evan Barker, SVP Healthcare, CapStar Bank

Amine Lahlou, Senior Vice President, Citi Healthcare Specialty Group

Mike Montgomery, Senior Vice President – Director, DSO Lending,
Live Oak Bank

Moderator: Eric White, Member, Dykema

Breakout C: Merging Success: Navigating M&A and HR Compliance

Presented by HR for Health

HR compliance is a crucial aspect of any M&A activity and organizations with a strong foundation of culture are more likely to achieve successful transitions. Join us to discuss the critical role of HR Due Diligence, its impact on the organization's culture as you scale, and the financial implication of employee engagement throughout the integration process.

Heidi Arndt, Founder, Evolve Dental Advisors

Ralf Tomandl, COO, HR for Health

Teresa Williams, CFO, CLA

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

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THURSDAY, JULY 20, 2023 (continued)

Breakout E: Unveiling the Intersection of Technology, Financing and Cyber Insurance

Presented by Sunset Technologies

This engaging conversation delves into the emerging intersection and integration of technology, finance, and cyber insurance as a function of risk management. As the dental industry rapidly evolves, embracing innovative solutions becomes paramount for success and security.

Patrick Jacobwith, CEO, Sunset Technologies

Larry Meador, Channel Chief, DataStream Cyber Insurance

Lee Rozeboom, Vice President and Managing Director of Sales,
GreatAmerica Finance

Breakout F: DSO Accounting

Derek Kaulfuss, Principal, Plante Moran

Mark Rudolph, Shareholder and Dental Practice Chair, Elliott Davis

Mike White, Principal, CLA

Moderator: Virgil Ochoa, Member, Dykema

Breakout G: Grow Your Business with 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.

Jason Haselhuhn, Chief Revenue Officer, PrimaHealth Credit

Breakout H: Measuring Associate Productivity

Dr. Hisham Barakat, Chief Clinical Officer, Guardian Dentistry 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

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THURSDAY, JULY 20, 2023 (continued)

- 3:30 p.m. – 4:00 p.m.** **Break**
Proudly Sponsored by Birdeye
- 4:00 p.m. – 4:30 p.m.** **Presentation of the 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 Dentistry Partners
David Pegg, Chief Growth Officer, Dental Care Alliance
Lane Theriault, CEO, Independence Dental
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, 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.** **Process Innovation: A Key Driver of “Same Store Growth”**
Laura D. Adams, Personal Finance Expert and Author

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THURSDAY, JULY 20, 2023 (continued)

- 6:30 p.m. – 6:45 p.m.** **Process Innovation Discussion**
Laura D. Adams, Personal Finance Expert and Author
Virgil Ochoa, Member, Dykema
- 6:45 p.m. – 11:00 p.m.** **Dykema DSO Reception and Party**
Proudly Sponsored by Straumann Group
- 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.** **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 and Thurston Group

FRIDAY, JULY 21, 2023

- 8:00 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
Chris Wright, Chief Growth Officer, iCreditWorks
Moderator: McKenzie Fagan, National Sales Manager, Henry Schein One

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FRIDAY, JULY 21, 2023 (continued)

- 9:30 a.m. – 10:00 a.m. Lessons from PE investors**
Dan Davis, Managing Director, Thurston Group
Robbie Isenberg, Managing Director, Clairvest Group
Eric Leaver, CEO, PracticeTek
Matt Ornstein, CEO, Ornstein-Schuler Investments
Moderator: Craig Woods, Member, Dykema
- 10:00 a.m. – 10:30 a.m. An Interview with Andre Agassi**
Proudly Sponsored by Sunbit
Moderator: Brian Colao, Director, DSO Industry Group
- 10:30 a.m. – 11:00 a.m. Break and Photos with Andre Agassi**
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
Holly Smyth, Managing Director, B. Riley Securities
Moderator: Virgil Ochoa, Member, Dykema
- 11:30 a.m. – 12:00 p.m. Solutions to the 4 Biggest Challenges in Group Dentistry Today:
Hiring, Productivity, Overhead & Operational Efficiency**
Presented by DEO

Dr. Anushka Gaglani, Co-Founder & CEO, Areo Dental Group
Dr. Alex Reznikov, President, J&J Dental Support Services
Dr. Eric Roman, Partner, Training and Leadership, DEO
Moderator: Brian Colao, Director of the Dykema DSO Industry Group
- 12:00 p.m. – 12:30 p.m. Grab-and-Go Lunch**
Proudly Sponsored by Dentsply Sirona