



MSSO 2nd Fall 2023 Lecture

Wednesday, November 15, 7pm EST

TITLE: FINANCIAL DECISIONS ORTHODONTISTS MUST GET RIGHT: Tax Strategies to Accumulate Wealth

SPEAKER: Hunter Satterfield, CPA with Cain Watters

COURSE DESCRIPTION:

The volatility and confusion surrounding the last few years has impacted every business, including orthodontic practices. This course offers an opportunity to flip today's uncertainty into a roadmap for future financial security. Taking the lessons learned from new tax legislation, staffing constraints, inflation and market volatility, this presentation will help orthodontists understand how they can leverage their business as a vehicle to reach their long-term goals.

In this content-rich, interactive course, attendees will learn proven formulas behind building wealth, improving cash flow, getting ahead on pension and retirement planning, plus the short- and long-term benefits of various savings environments. Using real case studies, this course will empower dentists with thoughtful techniques on utilizing business and tax strategies to invest more into their practice and retirement plans. It will compare dental practice owners' performance metrics to give attendees tangible examples they can leverage to evaluate their own situation.

Upon completion of this session, attendees should be able to:

- Identify tax strategies to improve cash flow and support market volatility.
- Set a realistic business and personal financial plan to help meet your long-term goals, even through times of adversity.
- Understand how to make your savings to work for long-term wealth and retirement.