

FREE CE Webinar Series for Practice Owners



PRESENTED BY:

Productive Dentist Academy
Pro-Fi 20/20 Dental CPAs
Professional Transition Strategies
Dentist Advisors | Financially Led



6 WEBINARS | SEPT. 9-14, 2025
PLUS LIVE PANEL Q&A SEPT. 17TH
Earn up to 6 Free CE Credits

BUILT TO SELL

Ready to Reign

You've built a million-dollar machine. Now it's time to make it buyer-ready, scale smart, or simply reclaim your freedom. Whether you're two years from selling or 5 years from reinvesting, this 6-part CE series will help you:

Led by Victoria Peterson, CEPA, CEO and co-founder of PDA, this series brings you expert financial planners, transition consultants, and practice growth strategists to answer the questions most dentists are too busy or too overwhelmed to ask.

- Lift practice valuation by 20–40%
- Eliminate hidden money leaks
- Navigate transitions with confidence
- Structure debt to your advantage
- Build long-term wealth and peace of mind

FREE WEBINAR SERIES

SEPT. 9 - 14 + LIVE Q&A SEPT. 17, 2025

World-Class Presenters & Learning Objectives



WEBINAR #1

BY PRODUCTIVE DENTIST ACADEMY

Uncover Your Hidden Value

Angela Golden, CEPA, VP, Client Services
Starla Bocanegra, Team Dev. Coach
Sara Hansen, Sr Marketing Advisor

- The four unseen assets that drive true value
- How real practices increase value by aligning team, brand, systems, and leadership
- What buyers pay for and how to start enhancing it today



WEBINAR #2

BY PRO-FI 20/20 DENTAL CPAS

Increasing Practice Value by 40%

Chris Sands, CFP

- Read financials like a buyer fast and easy
- Plug the silent "money leaks" in your daily operations
- Master mentoring metrics that boost team performance



WEBINAR #3

BY PROFESSIONAL TRANSITION STRATEGIES

From Attractive to Acquirable

Kim McCleskey, Practice Transition Consultant

- The difference between being "nice to look at" and actually sellable
- The metrics that matter: EBITDA, SDE, team turnover, and patient base health
- What funding sources buyers use, and how that impacts your deal



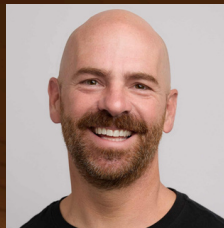
WEBINAR #4

BY PROFESSIONAL TRANSITION STRATEGIES

Exit or Expand?

Kyle Francis, MBA, Founder & President
Matt Zolfo, Merger & Acquisition Consultant

- Where are we in the practice acquisition cycle
- The real pros and cons of selling now vs. building a five-year strategy
- What PE firms and DSOs are really looking for in 2025-26



WEBINAR #5

BY DENTIST ADVISORS

Wealth Strategies for Dentists

Ryan Isaac, CFP, Co-Founder, Sr. Advisor

- A "Total Term" blueprint that aligns your wealth with your lifestyle goals
- Clarity on when to invest in marketing, training, and tech - and when not to
- Insight into how FFS vs. PPO influences your valuation



WEBINAR #6

BY FINANCIALLY LED

Your Latte Cost More than My Mortgage

Howard Polansky, DMD, MBA

- The difference between "safe" loans and smart loans
- How to use amortization schedules to predict and plan equity growth
- Strategic debt moves that unlock more cash and less stress



LIVE PANEL: Real Talk with Experts

Led by Victoria Peterson, CEPA, Co-Founder & CEO, Productive Dentist Academy

- Hear real-world success stories and mistakes to avoid
- Ask your toughest transition, valuation, and wealth questions live
- Leave with clarity on your next move



PRODUCTIVE DENTIST ACADEMY
Nationally Approved PACE Program Provider for FAGD/MAGD credit.
Approval does not imply acceptance by any regulatory authority or AGD endorsement.
10/1/2023 to 9/30/2027, Provider ID# 217561

First-time course given: September 9, 2025
Course review: September 9, 2027