

SCHEDULE

FEB 7 & 21

JEROME FRENCH

Jerome French, a Certified Public Accountant (CPA) and a Certified Valuation Analyst (CVA) with over 23 years of experience in taxes.

MARCH 7 & 21

JONATHAN MOFFAT

Jonathan Moffat, financial advisor and coach to dental practices, advisor for both your personal and professional vision and goals

APRIL 17

SHERRY MOSTOFI

Sherry provides specialized legal services for healthcare professionals in the fields of practice purchase and sales agreements, leases, corporations, HR and more.

Call the office to sign up. Your payment is proof of registration. (626).285.1174



Course fee: \$25 per course/\$100 for all five

***Course content is unique to each class and we recommend you take all five classes.**

***Course priority given to 0-10 year out grads**

Business Summit 2019

2 CE UNITS/COURSE
GUEST SPEAKERS



JEROME FRENCH
CPA



JONATHAN MOFFAT
DENTAL ADVISOR



SHERRY MOSTOFI
LAWYER

NEWLY REMODELED OFFICE

San Gabriel Valley Dental Society, 312 E. Las Tunas Drive, San Gabriel CA 91776

6-8:30 PM – Light Dinner served

CONTACT Lee@director@sgvds.org TO RSVP

W W W . S G V D S . O R G

Meet the speakers!



Jerome French

February 7

Overview: Tax Cuts and Jobs Act of 2017 and subsequent legislation
Corporate Tax Rates
Depreciation
Business Interest Limitations
Business Meals and Entertainment
Research and Development
Net Operating Loss

February 21

Pass-through Income
Specified Service Trades or Businesses
Individual Tax Rates
Alternative Minimum Tax
Personal Exemptions and the Standard Deduction
Child Tax Credit
Changes to Itemized Deductions
Affordable Care Mandate



Jonathan Moffat

March 7

Begin with your vision
- Start the design of your Ideal Life Vision
- Start the design of your Ideal Business Vision
Developing culture in your practice
- Your culture guide
Growth obstacles
- When to offer benefits
- Hiring and retaining good talent

March 21

Finance

- Accounting - How Reliable is your bookkeeping + accounting and how to tell if you are getting the numbers you need.
- Financial Reporting - What numbers should you be tracking and what are your numbers telling you
- Financing Your Growth - what are the best strategies to fund and build your business
- Forecasting - looking forward to needs for the business, tax strategies and reinvestment
- Accounts Payable - maximizing your vendor relationships
- Accounts Receivable - getting paid quicker and more efficiently
- Cash Management - what are the cash needs for your business

Marketing

- How to build a marketing plan for your practice
- ROI Analysis - how to measure the effectiveness of your marketing



Sherry Mostofi

April 17

Associate Agreements

- Employee versus contractor agreements
- Non-compete clauses

Forming a Dental Corporation

Purchasing a Practice

- The asset purchase agreement.
- The lease agreement.
- Benefits of acquiring real estate for your practice versus leasing real estate.

Partnerships

- Material terms
- Buy out procedures

Social media and a dental practice

- Online reviews
- Advertising criteria
- Website requirements (copyrights and ADA)

JOIN US FOR THIS AMAZING EVENT