2027 JANUARY MEETING WEBINAR

SELL, PARTNER, OR STAY INDEPENDENT?

Your practice is likely your largest wealth-building engine. Know what it's worth, and what your options are, before you have to decide.

One day, both sides of the table: an advisor who helped a DSO acquire 20+ practices, a Certified Valuation Analyst, a Dental CPA, and an Attorney who has closed hundreds of dental practice transitions. Send your questions in advance, and the panel will answer them live.



J. Haden Werhan
CPA/PFS · Earned Wealth



Brian Christensen
CFA · 7 Pillars



Christy Ratcliff
CPA, CVA · 7 Pillars



Casey Gocel
Esq. · Mandelbaum Barrett PC

WHO IT'S FOR **OMS practice owners and associates, whether you're buying in, growing, or planning your exit.**

REGISTER ONLINE
calaoms.org/events

CALAOMS Member	**$100**
Non-Member	**$100**
Resident / Dental Student	**Free**

WHEN
Saturday, January 16, 2027
9:00 am – 3:00 pm PT

WHERE
Live on Zoom · Opens 8:45 am
Can't stay all day? Every registrant receives the full recording.

No CE Credit: Dental Board of California's Code of Regulations 16 CCR §1016 - Article 4. Continuing Education (A)(D)(E)

CALIFORNIA ASSOCIATION of ORAL & MAXILLOFACIAL SURGEONS

WEBINAR SPONSOR The Doctors Company TDCGROUP

PROGRAM

Saturday, January 16, 2027 · 9:00 am – 3:00 pm PT

9:10 AM

Are your taxes, retirement plan and practice working together, or against each other?

- How proactive tax planning and your financials prepare you for any transition
- How to design a retirement plan that's tax-efficient for you and fair to your team

The Integration of Accounting, Tax & Wealth Management for OMS



J. Haden Werhan, CPA/PFS, Earned Wealth · Advising dental practices since 1990; has lectured at UCSF and UOP Dugoni

10:45 AM

What is your practice actually worth, and who should you sell it to?

- How EBITDA, valuation and timelines shape what you'll be offered
- Private doctor-to-doctor sale vs. DSO partnership: deal structures and buyer types compared

Navigating the Future of Your Practice: Your Transition Plan



Brian Christensen, CFA, 7 Pillars · Has sat on the buyer's side: helped U.S. Oral Surgery Management acquire 20+ practices in under 18 months



Christy Ratcliff, CPA, CVA, 7 Pillars · Certified Valuation Analyst guiding doctor-to-doctor and DSO transitions

12:15 PM Lunch & Installation of CALAOMS Officers

1:00 PM

Can you compete with DSOs without selling to one?

- Group and multi-location models that capture economies of scale
- Associate buy-ins that keep you in control and keep good associates

Preservation of Private Practice Dentistry: Scaling and Growing Your Private Practice in Today's DSO-Driven Market



Casey Gocel, Esq., Mandelbaum Barrett PC · Co-chair, National Dental Law Center; co-author of The DSO Decision

2:30 PM

Panel Q&A: your questions, answered

Registrants can submit questions in advance, or ask all four speakers live.

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