**CALAOMS 2027 January Meeting Webinar**

**"Sell, Partner, or Stay Independent?"**

**Saturday, January 16, 2027 ~ 9:00 am – 3:15 pm PT**

## Program

| | |
|---|---|
| 8:45 am | **Zoom Webinar opens** |
| 9:00 am | **Welcome** |
| 9:10 am – 10:40 am | Are your taxes, retirement plan and practice working together, or against each other?<br>***Haden Werhan, CPA/PFS, Earned Wealth.***<br>***Advising dental practices since 1990.***<br>"*The Integration of Accounting, Tax & Wealth Management for Oral & Maxillofacial Surgeons"* |
| 10:40 am – 10:45 am | **Break** |
| 10:45 am – 12:15 pm | What is your practice actually worth, and who should you sell it to? EBITDA, valuation and timelines; private doctor-to-doctor sale vs. DSO partnership.<br>***Brian Christensen, CFA, Chief Development Office, 7 Pillars.***<br>***Helped U.S. Oral Surgery Management acquire 20+ practices in under 18 months.***<br>***Christy Ratcliff, CPA, CVA , Managing Partner, 7 Pillars.***<br>***12+ years guiding doctor-to-doctor and M&A transitions.***<br>*"Navigating the Future of Your Practice: Your Transition Plan"* |
| 12:15 pm – 1:00 pm | **Installation of Officers**<br>**Lunch Break** |
| 1:00 pm – 2:30 pm | Can you compete with DSOs without selling to one?<br>***Casey Gocel, Esq., Mandelbaum Barrett PC. Co-chair,***<br>***National Dental Law Center: co-author of The DSO Decision.***<br>*"Preservation of Private Practice Dentistry: Scaling and Growing Your Private Practice in Today's DSO-Driven Market"* |
| 2:30 pm – 3:00 pm | **Panel Q & A** |
| 3:00 pm – 3:15 pm | **Legislative Update: *Michelle Rivas, CALAOMS Lobbyist*** |
| 3:15 pm | **Webinar Concludes** |