



**TROY MARRIOTT**  
200 W. Big Beaver Rd.  
Troy, MI 48084



**TIME**  
7:30 a.m. - 3:10 p.m.



**FEES**  
\$75 (includes breakfast and lunch)



**REGISTRATION**  
Visit [bit.ly/2018dentalsummit](http://bit.ly/2018dentalsummit)



**CE CREDITS**  
Earn up to 6 AGD CE credits

## AGENDA OVERVIEW

Registration and Breakfast  
7:30 a.m. - 8:30 a.m.

Welcome and Sessions  
8:30 a.m. - 12:00 p.m.

Lunch and State of Industry  
12:00 p.m. - 1:00 p.m.

Sessions  
1:00 p.m. - 3:00 p.m.

Closing Statements  
3:00 p.m. - 3:10 p.m.

305 West Big Beaver Rd., Suite 200  
Troy, Michigan 48084

## LEARN FROM INDUSTRY EXPERTS

GAIN INSIGHT ON . . .

- Impacts of the tax reform
- Utilizing social media for promoting your dental practice
- Compliance hot spots
- State of the industry
- And much more

NOVEMBER 2, 2018 | TROY MARRIOTT  
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# 2018

## DENTAL STRATEGIC

### INSIGHT SUMMIT



NOV. 2  
2018



# SESSION TOPICS

## TAX UPDATE: TAX REFORM AND MUCH MORE

**Stephen Skok, Shareholder – Doeren Mayhew CPAs and Advisors**

The Tax Cuts and Jobs Act of 2017 changed taxation as we know it. Join Doeren Mayhew's Stephen Skok as he walks through the key changes affecting individuals and dental practices, as well as proposed changes to be aware of. Leverage this session to discover its direct impact on you and your practice, including making sure you have the most optimal tax structure, additional tax-savings opportunities and strategies to minimize your tax liability this year and in the future.

## INTEGRATED DENTAL MARKETING... WHY SYSTEMS AND POLICIES ARE MORE IMPORTANT THAN POSTCARDS AND SEO

**Cory Schoebel, Director of Growth Management – Chrisad**

The key to a successful practice is doing onto others what they want done to themselves. Learn how to identify patient needs and wants as identified by Northwestern University Kellogg School of Management. Explore patient acquisition strategies, but more importantly, how to retain your patients and influence ambassadorship. In this session, we will discuss monitoring actual patient behavior and learning to disregard what people say they are going to do.

## STATE OF THE INDUSTRY

**Jeff Cormell, Vice President, Small Business – Bank of America**

Wondering what the current banking trends are and how they are impacting dental practices? Join this lunch discussion, where Bank of America's Jeff Cormell will discuss the current trends, what banks are looking for when financing a dental practice and common pitfalls to avoid.

## CE INFORMATION

Earn up to 6 AGD CE credits. No advance preparation or prerequisites required.

**SUBJECT CODES:** 550 Practice Management and Human Relations (5 credits), 132 Anesthesia and Pain Control (1 credit)

**TEACHING METHOD:** Group-Live

**PROGRAM LEVEL:** Overview/Basic

**CANCELLATION POLICY:** Cancellations must be in writing and received by Oct. 29, 2018; and will be subject to a \$50 processing fee. Cancellations received after the deadline will be non-refundable.

## INSURANCE INSIGHTS

**Tina Croley, Commercial Lines Manager – MDA Insurance**

Whether you're starting, running or trying to grow your practice, there are so many risks potentially hindering your success. MDA Insurance's Tina Croley will share insight on how you can gain peace of mind, protection and purchasing power with the right insurance policies in this must attend-session. You'll walk away with an in-depth understanding of the insurance policies you may require for your upcoming project.

## C.O.R.E. – GUIDE TO INCREASED CASE ACCEPTANCE

**Tricia Casasanta, Director of Operations – Strategic Practice Solutions, LLC**

Join this session to learn skills and systematic approaches to build relationships with your patients and increase case acceptance. Tricia will highlight how you and your team can make the most of the patients you already have, and leverage your skills to increase case acceptance and new patient conversions. You will learn how to use clinical techniques and in-office procedures to promote patients to ask you about treatment to sell themselves.

## REIKI: AN ALTERNATE APPROACH FOR PAIN MANAGEMENT IN THE DENTAL OFFICE

**Kristina Greene, Owner – Reiki 4 Me, LLC**

While you may be accustomed to utilizing modern medicine in the office, there is an alternative way to offer non-intrusive pain management to your patients, as well as your office staff to help reduce stress in the office. Join Reiki Master Kristina Greene as she walks you through the energy-healing technique of Reiki. Explore the benefits, how to use it as an additional tool for pain management and stress relief, and much more.



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4/1/2018 - 3/31/2021  
Provider ID: 217810

# MEET THE SPEAKERS



**Tricia Casasanta – Strategic Practice Solutions, LLC**

With over 27 years of experience, Tricia is in tune with the ever-changing needs of the dental industry. Throughout her career, she has provided talent, tools and training to assist dental practices in building their teams with the skills and business systems to run and grow their practices. As an industry leader, she is often called on to share her knowledge through various speaking engagements throughout the year.



**Jeff Cormell – Bank of America**

Jeff Cormell has been with Bank of America Practice Solutions since 1999. He has held numerous roles within the bank, while at the same time holding an ownership position within an Ohio-based dental management company. Jeff's unique experience drives valuable discussions when considering dental practice financing options.



**Tina Croley – MDA Insurance**

Employed with MDA Insurance for the past 24 years, Tina is a licensed insurance producer assisting dentists and their practices in limiting their risks through a wide range of insurance offerings. Focused on making sure her clients are properly insured to begin practicing, prepare for an upcoming acquisition or build a practice, she is a trusted business partner to many Michigan dentists.



**Kristina Greene – Reiki 4 Me, LLC**

As a Certified Level I, II and III Reiki Practitioner, Kristina has served as a counselor for development of mind, body and spirit for individual awareness and holistic spiritual healing for over 40 years. Certified by the International Institute for Complementary Therapists, Kristina is a national speaker on podcasts, as well as a curriculum creator and instructor on various individualized group and classroom topics.



**Cory Schoebel – Chrisad**

Since joining Chrisad in 1999, Cory has amassed a vast amount of knowledge and experience regarding practice growth and management. He has lectured regularly on the marketing and development of hundreds of successful Chrisad practices. Cory manages clients in the most challenging marketplaces and continuously monitors the dental industry's growth trends and statistics.



**Stephen Skok – Doeren Mayhew CPAs and Advisors**

Stephen works alongside dentists to provide strategic and operational advice for their practices. Additionally, he has helped many of them start their own practice, develop business plans and strategically purchase, sell or consolidate practices. Garnering 10 years of experience, he proactively evaluates current tax situations, as well as develops effective tax planning and preparation strategies for his clients.

**Disclaimer:** If Doeren Mayhew cannot hold the 2018 Dental Strategic Insight Summit event due to acts of war, government regulations, disaster, civil disorder or curtailment of transportation, by facilitating other emergencies, making it inadvisable, illegal, or impossible to provide the facilities or to hold the meeting, each prepaid attendee will receive a copy of all the handouts and materials that would have otherwise been distributed. Fixed conference costs will be paid for with funds received in the pre-registration process. Any remaining funds will be returned to the pre-registrants in connection with the conference. Doeren Mayhew is not responsible for any other costs incurred by those pre-registering in connection with the conference. Doeren Mayhew cannot be held liable in any way for losses due to travel issues. The views and opinions expressed by presenters are their own and do not necessarily represent those of Doeren Mayhew. Doeren Mayhew disclaims any responsibility for the use and application of information presented at this conference.