

We missed you!

Here is what we've been up to since we last met.

Hinman Member Chats

I've had success using...

How do you feel about...

Virtual Meetings

- ✓ Audit/Budget
- ✓ Sub-Committee #1
- ✓ Advisory Committee
- ✓ Society Bylaws
- ✓ Weekly Staff Meetings

HINMAN 2021

PLANNING SESSIONS

Courses - Special Events - Exhibits



WEBINARS

Free CE for Members

June



Mr. Brandon Collier
Paycheck Protection Program

July



Ms. Olivia Wann
OSHA Compliance during COVID-19

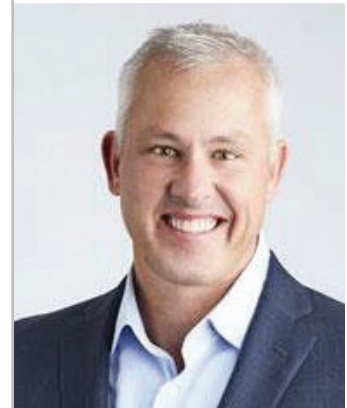
August



Dr. Jamison Spencer
Bruxism: Parafunction or Protective Function?

Inside View

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& Trustee Update	
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September 21	
Virtual CE and Business Meeting	



Mr. Charles Loretto
The Key to Overcoming Financial Uncertainty in 2020

President's Message

Change: Our Only Constant

Dr. Sedgie Newsom



I hope that everyone has had a safe and fun summer! In the midst of the pandemic, we've had to reinvent much of how we live, practice and play. A year ago who would have dreamed that our lives would have changed so much? After six months of social distancing, mask wearing, and basically practicing dentistry in what almost amounts to space suits, we've had to do what we've always done and that is to adapt to the changes forced upon us. So, too, has our Hinman Dental Society adapted and changed.

Our focus is always on our upcoming March meeting each year and all of the preparations leading up to it. Fortunately, our General Chair Dr. Bob O'Donnell and his program Chairs, Drs. Jane Puskas and William Rousseau, have had extra time to fine-tune their upcoming March 2021 program, Come Home to Hinman.

Our first Society meeting of the year is scheduled for Monday, September 21, 2020. Based on your feedback, we will be conducting the lecture and business meeting virtually. We're fortunate to have one of the country's leading experts in Dental Practice Finance, Mr. Charles Loretto with Cain Watters, speak to us on the financial impact of Covid-19, the CARES Act, financial planning around it and how it has impacted practicing dentists, as well as practice strategies and plans to not only financially survive the pandemic but to succeed. With so many changes to the CARES Act and potential ramifications, Charles' lecture will unravel the mysteries and will be one that you don't want to miss.

Our November 9, 2020, our Society meeting is scheduled to be held at the Crowne Plaza Atlanta Perimeter at Ravinia featuring Dr. Tom Viola, a Hinman favorite, lecturing on Pharmacological Implications within the practice of Dentistry. Then, on January 21, 2021, we'll welcome Dr. Roger Levin, a nationally known and dynamic speaker on practice management. Plan to bring your entire staff for a fun and entertaining evening.

Remember that all Hinman members are required to attend at least one of the three Society meetings during the year, but I hope that you'll make plans to attend all three.

Thus far this year we've offered three Hinman webinars for you. On June 29, Brandon Collier spoke on the Paycheck Protection Program, on July 27, Olivia Wann spoke on OSHA Compliance During the Covid-19 pandemic, and on August 31, Jamison Spencer spoke on bruxism. To access the webinars on demand, visit the Webinar Library at hinman.org/society.

For this coming year I'm fortunate to have two long-time dedicated Hinman members to serve during our meetings. Dr. David Anderson will serve as Program Chair while Dr. Henry Benson will serve as Hospitality Chair. David and Henry, thank you in advance for your willingness to serve.

By now most of you know that one of our Past General Chairs, Dr. Paul Isler, passed away suddenly on June 28, 2020. Paul was a great friend and mentor to so many of us and his passing creates a huge void in our Hinman family. We have all been so greatly blessed to have known and worked with Paul. May you rest in peace, my friend.

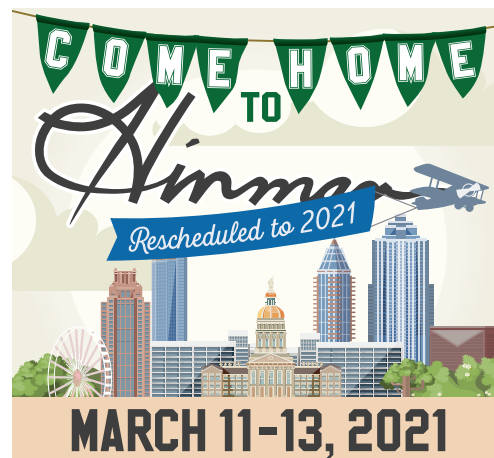
Finally, I would be remiss if I didn't acknowledge all of the excellent help that our Hinman staff has offered to me over the course of this past year and to thank them in advance for the fantastic job that they'll complete for this coming year. Words cannot measure the excellence that Sylvia Ratchford and her staff demonstrate on a daily basis to make our Society function at such a high level and to be the envy of all of the other dental meetings around the country. It's pretty special for us to be considered the Augusta National of Dental Meetings.

Speaking of Sylvia, she's making plans for her retirement next summer and unfortunately, 2021 will be her last Hinman year with us. Say it ain't so! In the 24 years that she's been our Executive Director, our Society has risen to new heights and has enjoyed a very elevated status and prestige among our fellow dental meetings. Among the many accolades, Sylvia has served as President of the Professional Convention Management Association SE Chapter and Chair of the Conference of Dental Meetings. The Hinman Dental Society has been blessed to have a person of such high standards, expectations and drive to lead us to new heights. Sylvia, we all look forward to working with you for another great year!

Thank you all for the honor you've bestowed upon me to serve yet another year as President of our Hinman Dental Society. If at any time you need anything or if I can be of help to you, please do not hesitate to contact me. I'm looking forward to another great year working with each of you.

As we prepare for what will no doubt be a very different Fall, I encourage each of you to take the long view. These challenging and unprecedented times will not last forever. Until we can return to the in person Hinman experiences that we value and treasure, know that the Hinman Dental Society remains committed to providing quality dental education and to planning a successful 2021 meeting. Stay safe and be of good spirit until we are together again.

Sedgie



Slate of Officers

Hinman Dental Society Executive Council Officers

President	J. Sedgie Newsom
President-elect	William H. Rousseau
Vice President	E. David Anderson
Secretary	Troy H. Schulman
Treasurer	Slade W. Lail
Assistant Secretary/Treasurer	J. Andrew Ramsey
Editor	Darryal D. McCullough
Parliamentarian	Roy A. McDonald

Executive Council

2023.	Randall J. Phillips
2023.	David P. Marion
2022.	Donald F. Brown
2022.	Patrick N. French
2021.	J. Matthew Mazzawi
2021.	Jeremy R. Ward

Trustees

2026	James A. Roos
2025	Dave C. Lee
2024	Bradley K. Greenway
2023	A. Allen French
2022	P. Edward Pafford
2021	L. Maxwell Ferguson [CH]

General Chair's Message

Hinman 2021 - Virtual Possibilities

Dr. Bob O'Donnell



Greetings to the Hinman family! I hope your summer was happy, safe and family-filled. I think if I asked you about your summer experience, I might receive the same answer across the board – that you stayed close to home, or you even took a brief, socially-distanced break to a beach, lake or mountain retreat. I know you would likely share that this summer was much different from the one you had planned for and/or expected to have this time last year. Flexibility and adaptability have been key words in our vocabulary this year, no doubt.

We recently ventured into online learning with our summer series of webinars featuring some of our Hinman 2021 speakers. The courses have been expertly delivered and timely in content, given the current COVID-19 pandemic. We hope you've been able to take advantage of these offerings, either live or through the Hinman website.

Your 2021 "Come Home to Hinman" team has been busy planning what March 2021 will look like. The ever-talented Hinman staff is expertly guiding us through uncharted territory, consulting with the best in the meeting planning industry and in the dental field. Decisions are being made only after the most thorough and up to date information has been evaluated and shared. Please know that the "Come Home to Hinman" theme means even more to this General Chair in these unpredictable times. Together, we are working to present the next "Best Hinman Ever"!

We are exploring two different scenarios for Hinman 2021. The first possibility is a hybrid meeting, with onsite courses but also with a selection of courses that would be live-streamed and recorded for later viewing. Attendees would be able to sign up for courses, depending on their personal preference and comfort level.

The second possibility would be an all-virtual meeting. With this format, we would maintain our dates of March 11-13, 2021 and offer a combination of recorded and live-streamed lectures and demonstrations. The meeting would not offer the traditional classroom environment courses, nor any social events. If the COVID-19 pandemic is still a significant concern in our lives, this option could likely be the best and safest one for us. We would

focus on presenting only those courses that would most successfully fit this new and different format. Regardless of which scenario is ultimately chosen, we are fully committed to presenting the best continuing education available in the manner for which Hinman is distinctly known. I am grateful that all committees will remain intact from last year, and I am confident that each of us will adapt to a "new and different" Hinman 2021 program. We will all support each other and blend our strengths in unprecedented ways to ensure the success of Hinman 2021!

Stay healthy, and well!

Wishing you my best,



Have an idea for the Hinman Connects Blog?

The article can be clinical, practice management related, motivational in nature or address specific topics such as COVID, nutrition, retirement or work/life balance... the possibilities are endless! Head to [Hinman.org/blog](https://hinman.org/blog) for submission guidelines or to subscribe to receive the blog posts via email. Please send ideas and questions to Britney Darby at bdarby@hinman.org. Thanks for your help!

@HinmanDental



Hinman Annual Meeting

The Omni Grove Park Inn
Asheville, NC
June 3-6, 2021

Events Calendar 2020-2021

September 14, 2020

Executive Council

Virtual Meeting

September 21, 2020

Membership Meeting

Virtual Lecture and Business Meeting

Speaker: Mr. Charles Loretto

6:00 p.m. Business Meeting, Lecture to follow

October 27, 2020

Executive Council

Hinman Executive Office

November 9, 2020

Membership Meeting

Crowne Plaza Atlanta Perimeter at Ravinia

Speaker: Dr. Tom Viola

4:00 p.m. Lecture

7:00 p.m. Cocktails and Dinner

January 5, 2021

Executive Council

Location TBD

January 21, 2021

Membership Meeting (Bring your Staff!)

Georgia Aquarium

Speaker: Dr. Roger Levin

4:00 p.m. Lecture

7:00 p.m. Cocktails and Dinner

February 4, 2021

New Member Orientation

Hinman Executive Office

March 11-13, 2021

The Thomas P. Hinman Dental Meeting

Georgia World Congress Center

May 4, 2021

Executive Council

Hinman Executive Office

June 3-6, 2021

Annual Meeting

The Omni Grove Park Inn

Asheville, NC

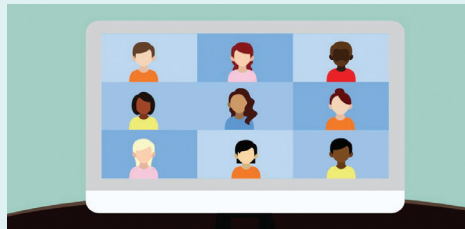
Hinman Member Chats

Thank you to all the members who took part in our Hinman Member Chats in May. It was a great way to connect virtually and share ideas and resources for getting back to your practices. Our volunteer moderators had some great reflections:

Dave Lee - For me, the greatest part of the discussion came from the diversity and experiences of the Hinman members represented. I really appreciate Elvis Babo sharing current information and representing us as President of the Georgia Dental Association. Our Honorary Hinman member Mark Hyman joined us after spending days and weeks being a co-host with several others on Kirk Behrendt's ACT seminars. His insights from being with experts in many fields of dentistry was so valuable. But the best thing for me was the breadth of experience and knowledge of our membership during the Chat. From doctors with over 40 years of experience to our young dynamic members who brought their wonderful insights and energy to the Chat was time well spent for me.

Patrick French - Our round table discussion seemed to give valuable and pertinent information to those in attendance. We discussed the possibilities of whether or not to charge for PPE in the early days of reopening, how to sterilize operatories in a timely manner and different devices being used to eliminate aerosols. We were able to bounce ideas off each other in the hopes of making reopening more comfortable for patients, staff and ourselves. I feel that the meeting was very helpful.

William Rousseau - We had a nice mix of people that had returned to practice and people who were preparing to return. We discussed not only the enhanced protection necessary to return to practice, but also the financial steps we were taking to ensure practice success. We also shared tips on what made patients feel comfortable during their return to the office. The relaxed setting and a small group made for a very successful discussion with a lot of great tips.



We hope you will join us on Zoom for the next Hinman Member Chat. More info to come soon!

Member News



Dr. Dave Lee and his wife Cheryl welcomed grandson Alexander Lee Polito on June 3.

The proud parents are Yoann and Lauran Polito.

In Memoriam

Dr. Henry Gremillion
(Honorary Member)
May 18

Dr. Paul Isler
(Advisory Committee Member)
June 28

Dr. Walter Stewart
July 17

Dr. Emile Fisher
June 22

Dr. Jeff Baumrind
July 18

Send any member news to Jackie Sarvis,
jsarvis@hinman.org

2020-2021 SOCIETY COMMITTEE LIST

Annual Meeting

(CH) Brett Schroeder

Bylaws

(CH) William Rousseau
David Anderson
Kristina Dawson
Brad Greenway
Eddie Pafford
Jane Puskas

Distinguished Service Award

(CH) Bob O'Donnell
Jonathan Dubin
Max Ferguson
Sedgie Newsom
Jim Roos
William Rousseau

Finance

(CH) Andy Ramsey
Lauren Bowersox
Donnie Brown
Max Ferguson
Amy Kuhmichel
Slade Lail
Matt Mazzawi
William Rousseau
Brett Schroeder

Hospitality

(CH) Henry Benson
Henry Blair
Charlene Brown
Angela Johnson
Azita Mansouri
Michael Mansouri
Brock Pumphrey
Steve Rafeedie

Molly Ruiz
Chris Shim
Casey Shuster
Robert Wunderle III
Pat Yancey IV
Nelson Yang

Membership

(CH) David Anderson
Eric Anderson
Susan Anderson
Evis Babo
Janine Bathea
Henry Benson
Laura Braswell
Melissa Durand
Patrick French
Ken Gilbert
Ben Hawkins
Wayne Kerr

Amy Kuhmichel
Slade Lail
Michael Leingang
David Marion
Matt Mazzawi
Darryal McCullough
Heather McGee
Justin Parente
Randy Phillips
Brett Schroeder
Karyn Stockwell
Michael Vernon
Travis Watson
Marvin Winter

Membership News

(CH) Patrick French

Member Obligations

Jonathan Dubin
Roy McDonald
Sedgie Newsom
Bob O'Donnell
Kate Robinson
William Rousseau

Nominating

(CH) Roy McDonald
Max Ferguson
Allen French
Dave Lee
Michael Leingang
Anthea Mazzawi
Victor van Greuning
Ex-Officio: Sedgie Newsom

Program

(CH) David Anderson

Proposed Bylaws Changes

The Bylaws Committee of the Hinman Dental Society met on Tuesday, August 4, 2020 and is recommending the following changes. Please review the proposed changes thoroughly. The Hinman Membership will vote on the following changes during the September 21 virtual business meeting.

Introduction to the Bylaws

The Bylaws will be updated to reflect the new revisions as of September 21, 2020.

Article I Section 3

Add “active or associate” to the following heading and sentence:

Application for active or associate membership: The application for **active or associate** membership shall be made, in writing, on the recognized membership information form approved by the Society, setting forth the candidate’s name, address, date of dental license and other information as the Society may require.

Add the subheading “Section 4” to the Active Membership paragraph. All other sections of Article 1 will be renumbered accordingly [section 4 becomes section 5, section 5 becomes section 6, and so on].

Article I Section 5 [previously section 4]

Remove the first sentence and replace with the following sentence in red:

Associate membership: Application for and election to associate membership shall follow the same procedure as for active membership. **In order to maintain associate membership, the member must be ethical and must retain and maintain membership in good standing in the American Dental Association.**

Article I Section 11 [previously section 10]

Replace “will” with “may” in the following sentences:

Any member who does not adhere to the stipulations of membership **will** **may** be placed on probation for one meeting year. If the member fails to adhere to the stipulations of membership during the probationary year, membership **will** **may** be revoked.

Article II Section 2

Replace “preside at” with “attend” in the following sentence:

President: The President shall ~~preside at~~ **attend** all meetings of the Society.

Article III Section 3

Add the following paragraph:

The Executive Council’s authority to control the entire business of the Society expressly includes the authority to take any necessary and reasonable action in an emergency situation. An “Emergency Situation” shall be defined as the rescheduling or cancellation of the Thomas P. Hinman Dental Meeting; the rescheduling or cancellation of a meeting of the Society that is provided for in Article VIII, Section 1; or any event or occurrence outside of the control of the Society that impacts the Society’s ability to conduct its normal business. The Executive Council may only take action that conflicts with one of the Bylaws if such action is approved by a three-fourths [3/4ths] affirmative vote of the Executive Council members present and voting at a meeting with a quorum present. The Executive Council shall not, however, take any action that conflicts with any provision contained in Article V, Article IX, Article X or Article XI of the Bylaws.

Article VII

Add headings to each section of Article VII as follows. The content of each section will remain unchanged.

Section 1. Amount
Section 2. Exemptions
Section 3. Non-payment of dues

Article VIII Section 1

Make the following changes [in red] to section 1:

The **members of** the Society shall meet in September, November, **and** January, **and during the Annual Meeting.** Authority to postpone, **or** change the date of, **or cancel** the **a** meeting is vested in the President. The time and place for holding each Annual Meeting shall be fixed by the President and approved by the Executive Council and will be held as close to the fiscal-year end as possible.

Article VIII

Add Section 6 to address virtual meetings:

Section 6.

Virtual meetings: In the event that an in-person meeting prescribed by these Bylaws in Article VIII, Section 1 is cancelled, the business of the Society may be conducted as a virtual meeting and held within a reasonable time after the cancelled meeting date. Any virtual meeting shall be conducted using reasonable videoconferencing or telephonic means that allows participants to listen to the proceedings in real time and participate as they would in an in-person version of the same meeting. Notice of any virtual meeting shall be emailed to participants and posted on the Hinman member website a minimum of five [5] business days before the date of the newly scheduled meeting. Such notice shall include the date and time of the meeting; instructions on how to participate in the meeting; a description of all matters for which a meeting is being called; and any other information that should reasonably be communicated to the participants in advance of the meeting.

In the event that any matter is to be put to a vote of all or a subset of members of the Society and such vote cannot be taken at a regular in-person meeting due to the meeting’s cancellation, such vote may be taken by electronically transmitted ballot.

Before any action is taken, each person entitled to participate in the vote shall have the chance to join in a discussion of the matter. During the meeting, a formal motion to take the proposed action shall be made and seconded before discussion opens. Minutes shall be taken at the virtual meeting and will be published in the next issue of the *Hinman Preview/Review*.

Article X Section 1

Add the following changes in red:

These bylaws **must** **may** be amended by a three-fourths [3/4] affirmative vote of the active members present and voting at any regular meeting **[including a properly called virtual meeting]**. A proposed amendment **has been** **shall be** signed by five [5] active members in good standing and **has been** **shall be** placed in the hands of each active member at least five [5] business days prior to the meeting **vote thereon**. Publication of proposed amendments in the *Preview/Review* **and its** **with** distribution **according to in accordance with** Article II, Section 9; shall be considered due notice.

Read the full Hinman Dental Society Bylaws online at www.hinman.org/society/resources

Executive Council Meeting Minutes

DATE: Tuesday, May 5, 2020

TIME: 6:00 p.m.

PLACE: Zoom (Virtual Meeting)

PRESIDING: Dr. William Rousseau, President-elect

INVOCATION: Dr. Sedgie Newsom, President

OFFICERS: Sedgie Newsom, William Rousseau, David Anderson, Troy Schulman (absent), Slade Lail, Andy Ramsey, Darryal McCullough **EXECUTIVE COUNCIL:** Jeremy Ward, Matt Mazzawi, Patrick French, Donnie Brown, David Marion, Randy Phillips **TRUSTEES:** Max Ferguson, Eddie Pafford, Allen French, Brad Greenway (absent), Dave Lee, Jim Roos **HINMAN CHAIRS:** Bob O'Donnell, Kate Robinson, Roy McDonald **ADVISORY BOARD CHAIR:** Jonathan Dubin **STAFF:** Sylvia Ratchford, Jackie Sarvis

CALL TO ORDER: President-elect William Rousseau called the meeting to order at 6:07 p.m.

MINUTES: Secretary Troy Schulman presented the minutes from the January Executive Council Meeting, the January Membership Meeting and the two Executive Council Conference Calls as printed in the May *Hinman Preview Review*. Both sets of minutes were approved (Ramsey/Mazzawi).

FINANCE: Treasurer Slade Lail presented the current Year-to-Date Society Financial statement. The statement was approved as follows (Lail/Ramsey):

Beginning Balance:	\$ 149,562.18
Net Income:	\$ (65,200.60)
Ending Balance:	\$ 84,361.58

MEETING UPDATE: Executive Director Sylvia Ratchford provided a summary of the staff's actions leading up to and since the cancellation of the 2020 Meeting. Those actions included providing refunds to all exhibitors and attendees, negotiating with our supplier partners for refunds or rollovers of deposits to the 2021 Meeting, and necessary interactions with Sub-Committee #1, Advisory Committee and the Trustees. The staff is currently researching platforms for virtual learning opportunities for Hinman in order to provide CE for the members as well as other dental professionals.

ADVISORY: Chair Jonathan Dubin reviewed recommendations from the Sub-Committee #1 and Advisory for the upcoming fiscal year. The recommendations for staff compensations were approved (McDonald/Phillips). The recommendations for extending vendor contracts were approved (Mazzawi/Ferguson).

HINMAN 2020: General Chair Bob O'Donnell thanked everyone for their support and confidence in allowing Hinman 2020 to take place in 2021. He also thanked the Hinman Staff for making the arrangements to move all contracts forward and avoid as many double expenses as possible. He shared that all but two of the 2020 speakers were available to speak at Hinman 2021. Dr. O'Donnell and his program team will be tweaking the program soon and are hopeful for a successful 2021 Meeting.

HINMAN 2021: Chair-elect Kate Robinson commended Bob O'Donnell on being a strong leader and for keeping Hinman's safety in mind when supporting the decision to cancel the 2020 Meeting. Dr. Robinson will be working on Hinman 2022 (formerly 2021) and hopes to build in a continuation of learning between the Hinman 2021 and 2022 speakers.

HINMAN 2022: Vice Chair-elect Roy McDonald thanked Bob O'Donnell and the Hinman Staff for the work leading up to and since the cancellation of the Meeting. He will use the extra year to scout and build his Hinman 2023 program. Dr. McDonald plans to scout ADA in Orlando this fall. His main focus at this time is to support Bob O'Donnell and Hinman 2021.

TRUSTEES: Chair Max Ferguson made a motion to enter executive session. The motion was approved (Ferguson/Schulman). Dr. Ferguson asked for a motion to exit executive session. The motion was approved (Rousseau/Anderson). Chair Ferguson reported that Hinman had paid refunds to all of the exhibitors and attendees by the date committed. The Trustees have been in consultation with our CFO - Susan Bangs, our financial advisors - Henssler and Associates, and our accounting firm - Brooks McGinnis to ensure appropriate steps for our investments and cash flow moving forward. Even though the Meeting was canceled, the Trustees honored the commitment of providing \$183,000 in student scholarships.

OLD BUSINESS: None

NEW BUSINESS: None

MEMBERSHIP REPORT: Chair David Anderson reported that there are currently 13 nominations for membership into the Society. Applications have been mailed to the applicants. The electronic nomination form is live on hinman.org/society.

MEMBERSHIP NEWS: Chair Patrick French gave the membership news report.

REMARKS: William Rousseau announced the Membership Meeting Dates (September 21, November 9, January 21). He also shared that the Executive Council dates for the 2020 - 2021 year will be announced this summer.

ADJOURNMENT: Dr. Rousseau adjourned the meeting at 7:30 p.m.

Annual Meeting Business Meeting Minutes

The business that was scheduled to take place at the Annual Meeting at The Omni Grove Park Inn in Asheville, NC will now take place during the September Membership Meeting Business Meeting.

TRUSTEE UPDATE

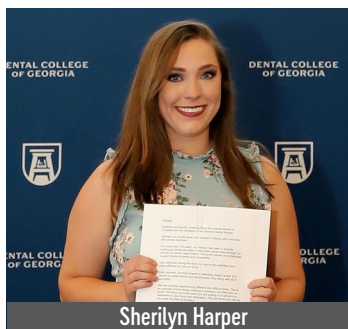
Hinman Gifting Continues

Earlier this year, the Hinman Board of Trustees continued their annual scholarship support of the Dental College of Georgia with an increased gift of \$250,000. These funds were used to provide scholarships to dental students in each class: freshman, sophomore, junior and senior. Forty-two students received Hinman scholarships.

Like everything else, this year's scholarship recognition looked different. Typically, the school recognizes these scholars each summer with an in-person scholarship ceremony. Members of the Hinman Board of Trustees travel to Augusta to personally recognize the students. However due to COVID this year, guests were not allowed to attend the ceremony. While the Board missed attending, they send their congratulations to the students on receiving the scholarships and best wishes for the new school year!



Dean Carol Lefebvre



Sherilyn Harper



Dylan Walker



Veronica Xia



Miles Woodard

DATE & LOCATION

Monday, September 21, 2020
Virtual Lecture and Business Meeting

Business Meeting - 6:00pm

**Please make every effort to join the business meeting prior to the start of the lecture.*

Lecture will start immediately following the conclusion of the business meeting, approx. 6:30pm.

Register online at www.hinman.org/society

The Key to Overcoming Financial Uncertainty in 2020

Out of adversity comes opportunity—and today's pandemic is no different. In this two-part series, CWA Partner and Transition Specialist Charles Loretto joins us live via zoom to share some of the biggest challenges the dental profession is facing today. From forced shutdowns to small business stimulus provisions—2020 presents fresh challenges surrounding tax planning, valuations, human resources, liquidity and lending. It's no wonder younger dental professionals are more nervous about ownership than ever before.

In Part 1, Charles will recap the impact COVID-19 restrictions had on businesses this spring. Last minute decisions surrounding staff, stimulus funds and keeping doors open were essential to keeping business afloat. As owners emerge from the other side, many are finding themselves in a better position than expected. Although extra cash and strong balance sheets could pose a problem come end of year, as dentists need to be aware of the tax liability due to stimulus packages and strategic planning strategies. Charles will share live case studies and show some of the planning techniques that could minimize tax liability surprises.

CHARLES LORETTO

Charles joined CWA in 2001 and became partner in 2016. He plays a critical role in growing the firm's client base as the director of business development, marketing and new client services.

He regularly speaks to dental schools and residency programs, study clubs, dental symposiums and state and national dental meetings. Since 2004, Charles has presented to over 30,000 dentists and 51 dental schools. He is a published author, and host of the top-ranking dental podcast, *Transition Talk*.

Charles oversees the practice transition department for CWA, and is founder of affiliate company, National Dental Placements, that assists doctors in the buying, transitioning and valuation of a practice. He and his team help hundreds of clients and non-clients with their transition goals annually.

Using his insight and experience from almost two decades in the dental industry, his passion is helping diagnose the financial support dentists need and then connecting them with someone who will then help them achieve their financial goals.

He is married to Roxane and between them they have four high school and college-aged children.



In Part 2 of this series Charles returns to build on the planning techniques dentists need to consider when they are expanding the business or potentially transitioning. He will review simple transitions as well as talk through common pain points such as acquiring patients' charts from a doctor that perhaps may not return to dentistry, when to consider hiring an associate during the crisis, practice valuations during a pandemic, purchasing a second practice or becoming a first time owner. He will run several different case studies to demonstrate how the numbers of the practice really dictate the best possible solution.



MEETING REGISTRATION FORM

REGISTRATION INFORMATION

Registration Fee \$25

Zoom link will be sent on September 21

Charles Loretto will deliver a live, one-hour lecture on Monday, September 21. Part 2 of his lecture will be released on-demand on the Hinman Website within 10 days. Part 1 will also be released on-demand if you are unable to join on September 21. The \$25 fee includes part 1 and part 2, a total of two hours of CE.

Name: _____ AGD# _____ Fee: ☐ \$25
☐ Member ☐ Guest

Name: _____ AGD# _____ Fee: ☐ \$25
☐ Member ☐ Guest

Name: _____ Fee: ☐ \$25
☐ Member ☐ Guest

Total: _____

Make checks payable to:
The Hinman Dental Society
Mail to: 33 Lenox Pointe, Atlanta, GA 30324-3172
For questions, call (404) 231-1663

You can also register online at hinman.org/Society



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Atlanta, GA 30324-3172

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Dr. Darryal McCullough, Editor

Save the Date

Hinman Membership Meetings

A GREAT VALUE & OPPORTUNITY TO SEE YOUR HINMAN FRIENDS

September 21, 2020

Mr. Charles Loretto – Financial Planning
Virtual Meeting

November 9, 2020

Dr. Tom Viola – Pharmacological Implications
Crowne Plaza Atlanta Perimeter at Ravinia

January 21, 2021

Dr. Roger Levin [staff lecture] – Practice Management
Georgia Aquarium