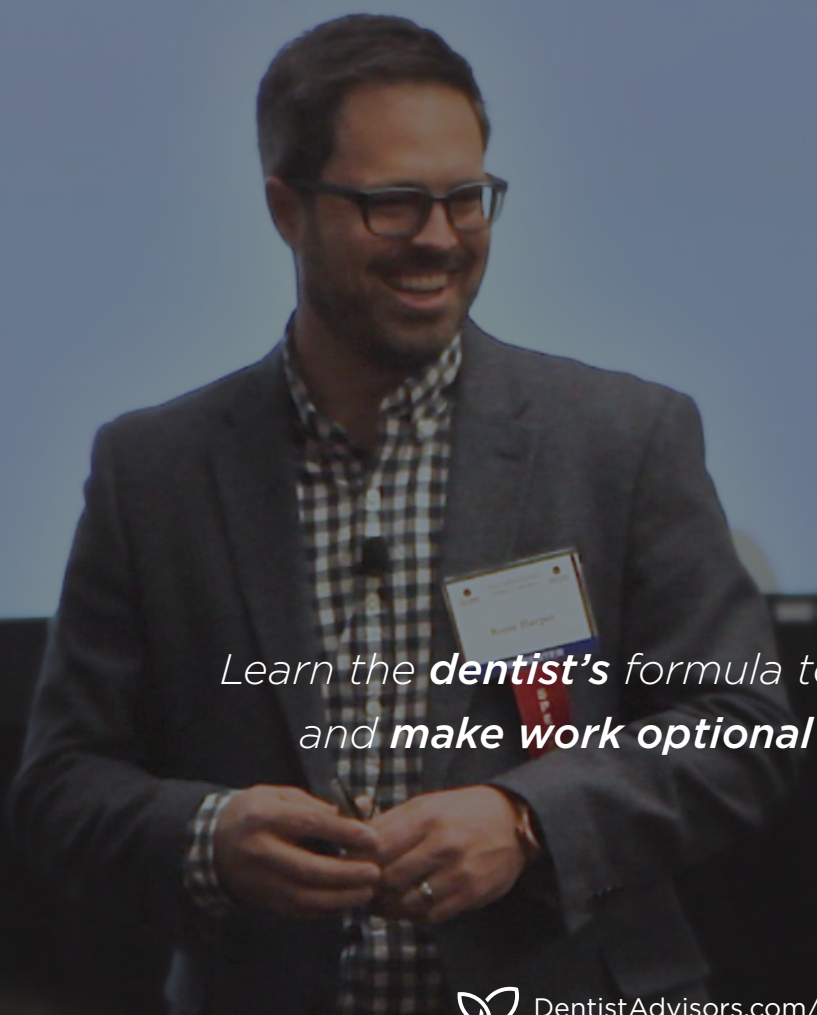




REESE HARPER

DENTISTRY'S FINANCIAL THOUGHT LEADER



Learn the **dentist's** formula to **build wealth faster**  
and **make work optional** at an earlier age.



KEYNOTE PRESENTATION

# 4 Keys for Dentists

TO ACHIEVE FINANCIAL INDEPENDENCE

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**Did you know dentists consistently rank among the highest-earning professionals in the nation, yet retire six years later than the average American?**

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In this interactive presentation, Reese Harper, CFP® highlights the big reasons for the backward trend and addresses four key questions every dentist should be able to answer:

How much wealth do I need to make work optional?

Do I have the right mix of assets?

Am I using my income wisely?

Am I taking the right amount of risk?

## OBJECTIVES

Understand what it means to build wealth

Learn why dentists retire later than they should

Use the Elements® table of financial indicators to track financial progress

Calculate Total Term progress toward retirement

### DURATION

3 hour full presentation

*May be modified to accommodate shorter meeting times*

### FEATURES

Live audience polling with mobile devices

Elements® booklet for work session

Total Term guidebook

Open Q&A throughout presentation

### AUDIENCE

Dentists and spouses

### HONORARIUM

\$2,500

“

*“One of the best CE’s I’ve ever attended.  
Information was presented clearly and  
openly. Very helpful!”*

**- Dr. Leslie Murray**

DENVER, CO



KEYNOTE PRESENTATION

# 5 Steps to Better

INVESTMENT PERFORMANCE

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**The noisy world of investing makes it hard to know where your money should go and feel confident your portfolio is managed the right way.**

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The truth is one bad investment can erase several years of hard work. In this cut-to-the-chase presentation, Reese Harper, CFP® brings a complicated subject down to earth and explains how to overcome the costs of:

- Irrational investor behavior
- Hiring the wrong advisor
- Underestimating risk tolerance
- Poor investment selection
- A mismanaged portfolio

## OBJECTIVES

- Understand how financial markets work
- Identify and overcome behavioral tendencies that lead to poor investments
- Know the questions to ask when hiring a financial advisor
- Learn the investment principles followed by world-renowned economists

### DURATION

2 hour full presentation

*May be modified to accommodate shorter meeting times*

### FEATURES

- Behavioral science demonstrations with audience participation
- Sample portfolio review
- Open Q&A throughout presentation

### AUDIENCE

Dentists and spouses

### HONORARIUM

\$2,500

“

*“Very engaging, smart, and informative! You converted a scary and foreign topic into something my brain can understand.”*

**- Dr. Gina Marcus**

CORAL GABLES, FL



## Meet Reese

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Reese Harper is the founder and CEO of DentistAdvisors.com, a registered investment advisory firm which focuses exclusively on dentists and specialists. His proprietary planning methodology called Elements® is used by dentists across the country to track their progress toward financial independence.

Reese is the host of the Dentist Money™ Show, a weekly podcast which helps thousands of dentists make smart financial decisions. He is also a regular contributor to major publications in the dental industry, and a popular speaker at dental conventions, continuing education events, and dental districts all over the U.S.

### **To book Reese for your next event visit**

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(800) 890-8095

### **RECENT PRESENTATIONS**

Yankee Dental Congress, Florida Dental Association, Utah Dental Association, Colorado Dental Association, Roseman College of Dental Medicine, University of Utah Dental School, Great Basin Dental Academy, South Davis Dental Society, Practice Pathways