Please join Bill Morris of Rozar Morris, LLC Certified Public Accountant for Dental Practices as he presents:

**Important Issues for Dentists**

8:00 am to 1:00 pm  
Friday, October 17

Smokejack Southern Grill  
29 South Main Street, Alpharetta, GA  30009

breakfast and full lunch included for $35 per person  
(Bring a spouse, colleague, partner of study group dentist for free!)

RSVP by Noon, October 13th

**TOPICS and SPEAKERS:**

- **HIPAA For Dentists:** Andrew Kaiser, Attorney – Stout Kaiser Matteson Peake & Hendrick, LLC
- **Nothing Is More Expensive Than A Missed Opportunity:** Benjamin Suggs - Practice Treatment Plan, Inc.
- **Transition Options In Today’s Marketplace:** Richane Swedenburg, New South Dental Transitions
- **Merger Synergy:** Bill Morris, CPA – Rozar Morris, LLC
- **Journey Toward Retirement:** Norman Plotkin, JD, CLU, ChFC, AEP, CLTC - Ashford Advisors, Inc.
- **Market Update:** Fred Lanier, VP - JP Morgan Asset Management

*This event is sponsored by the above-named individuals and organizations.*
To register for *Important Issues for Dentists*, please complete the information below and return it with your check for $35 per person (dentist’s guest is free).

**Reservation must be received by Noon, Monday, October 13th in the office of Rozar Morris, LLC.**

Please make checks payable to Rozar Morris, LLC, and mailed to:

*Rozar Morris, LLC, 2250 Satellite Boulevard, Suite 165, Duluth, GA 30097*

You may also pay at the door. For questions, call 770-232-1616 or email morris@rozarmorris.com.

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**Attendee Name(s):**

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**PROGRAM SCHEDULE:**

- Registration & Breakfast: 8:00 – 8:30am
- Speaker Programs: 8:30 – Noon
- Q&A over Lunch: Noon – 1:00pm

HIPAA For Dentists: Andrew Kaiser, Attorney – Stout Kaiser Matteson Peake & Hendrick, LLC
Andrew is a founding partner of the law firm of Stout Kaiser Matteson Peake & Hendrick, LLC, and has practiced law in Atlanta for over twenty years. Andrew practices in the areas of corporate law, including entity organization, mergers and acquisitions and general business matters, commercial real estate and estate planning. Andrew has developed a particular focus and expertise regarding the legal issues particular to the dentistry profession. Andrew represents dentists regarding various legal matters, including practice startups, acquiring, selling and transitioning existing practices, regulatory compliance, employment and partnership issues, associate and independent contractor agreements, office leases and real estate acquisitions, and licensure proceedings. Through Georgia Dental Law (www.georgiadentallaw.com), a professional practice group of Stout Kaiser Matteson Peake & Hendrick, LLC, Andrew and the other attorneys of the firm offer Georgia's dentists a “one stop shop” specializing in their professional, business and personal legal matters.  770.349.8202 akaiser@stoutkaiser.com

Nothing Is More Expensive Than A Missed Opportunity: Benjamin Suggs - Practice Treatment Plan, Inc.
Ben Suggs is the owner of Practice Treatment Plan, Inc., an Atlanta based dental marketing company that connects great patients with great doctors. Practice Treatment Plan offers a wide range of Marketing and Patient Experience solutions, including Branding, Websites, Social Media, Print Collateral, Patient Experience Training and Dental Call Tracking. Ben attended Hampden-Sydney College in Virginia for his BA, and the Thunderbird School of Global Management for his MBA. He started his first marketing services company at the age of 21, and has also held marketing management positions for companies like American Express, Accenture and Citigroup. He has worked exclusively with healthcare practices for the last 4 years. Ben will teach you how to make sure that you are maximizing the your Marketing Return on Investment.  (888) 412-8820 ben@practicetreatmentplan.com

Transition Options In Today’s Marketplace: Richane Swedenburg, New South Dental Transitions
Richane Swedenburg is the founder and president of New South Dental Transitions, Inc. Since 1987, Richane has been helping dentists succeed through greater financial security and quality of life. Gone are the days of the cookie cutter transaction. Transitions in today's financial environment require an experienced professional to maximize profit and eliminate costly mistakes. Richane helps clients find creative strategies that foster a win-win situation for all. She will offer keen insights into: 1) How to define your personal transition goals; 2) Understand your transitions options; and 3) Determine a personal transition strategy that is right for you.  (770) 630-0436 richane@newsouthdental.com
Merger Synergy: Bill Morris, CPA – Rozar Morris, LLC

Specializing in Accounting, Tax & Business Planning for Dental Practices, Bill Morris is tax CPA with 27 years of experience in tax matters. An Atlanta native, Bill received both his Bachelor of Business Administration (accounting) and Master of Taxation from Georgia State University. His company is focused on helping dentists plan for the future and minimize income tax consequences. Bill and his staff strive to provide superior responsiveness and service to the busy dentist. Bill will talk about: 1) the low risk and immediate benefits of a practice merger; and 2) other topics of interest to dentists.

(770) 232-1616
morris@rozarmorris.com

Journey Toward Retirement: Norman Plotkin, JD, CLU, ChFC, AEP, CLTC - Ashford Advisors, Inc.

Norman Plotkin made the transition from law practice to financial planning 34 years ago. Norman works with each of his clients with the goal of helping them earn more money through improved financial strategies, reach their financial goals sooner, and have more fun with the money and time available for personal, professional, and charitable goals.

Registered Representative and Financial Advisor of Park Avenue Securities LLC (PAS), Two Ravinia Drive, Suite 750, Atlanta, GA 30346, (770) 390-2600. Securities products/services and advisory services are offered through PAS, a registered broker/dealer and investment advisor. Financial Representative, The Guardian Life Insurance Company of America (Guardian), New York, NY. PAS is an indirect, wholly owned subsidiary of Guardian. Ashford Advisors is not an independent registered investment advisor, nor an affiliate or subsidiary of PAS. Neither Guardian, nor its subsidiaries, representatives, or employees provide tax or legal advice. You should consult with your tax or legal advisor regarding your individual situation. Not practicing for Guardian or any subsidiaries or affiliates thereof. PAS is a member FINRA, SIPC

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nplotkin@ashfordadvisors.net


Hear insights on today's most critical economic and investment topics from Fred Lanier, Vice President, Client Advisor, J.P. Morgan Asset Management. Using the most recent edition of our Guide to the Markets, he will share thoughts on the current economic landscape and outlook for the balance of 2014 & for 2015. He will discuss key drivers and trends taking place in the markets and answer your most pressing questions. Fred Lanier, is Vice President and Client Advisor for J.P. Morgan Asset Management. A native of Statesboro, GA, Fred began his career in financial services in 1980. He has worked with some of the largest and most respected asset managers in the world and joined J.P. Morgan in 2002. Fred will discuss the economic forces currently shaping the US economy, and what this means to you. Fred & JP Morgan Asset Management are one of several asset management partners of Ashford Advisors. Contact Norman Plotkin (see above) for additional information or questions.

770-366-0655
fred.lanier@jpmorgan.com