

You may be able to increase attendance by including two issues that appeal to different age groups or practice stages. Your meeting would certainly be information-packed. If you prefer a more in-depth look at the subject matter, you will want to schedule us for different meetings. Feel free to mix and match the following topics; either of us can speak from 30 minutes to 2 hours on these subjects.

<p align="center">Sharon Weaver, CFP, AWMA Owner, Mission Financial Planning Advice-only financial consulting for dentists sharon@missionfinancialplanning.com</p>	<p align="center">Karen Hughey, MLRHR Founder, CEO, KH-HR Simplifying HR so dentists can focus on patients karen@kr-hr.com</p>
<p align="center">How To Get from Here to Retirement</p> <p>Whether you are just starting out, or wrapping up your working life, you would probably like to know how much longer you need to work, when you can retire, and what you'll need to do to get there.</p> <p>Attendees will learn:</p> <ul style="list-style-type: none"> ✓ Rules of thumb on how much money you need to retire, ✓ Special considerations when you are a retiring practice owner ✓ Solutions for getting there faster <p>Whether your goal is retirement, or simply the financial freedom to know that you can, this presentation will give you a framework to get there.</p>	<p align="center">Interviewing from A to Z</p> <p>During this interactive workshop, participants will:</p> <ul style="list-style-type: none"> ✓ Learn the importance of and how to market their organization and attract quality candidates ✓ Learn how to legally and effectively interview candidates to select the right new hire ✓ Learn how to facilitate a great first day on-boarding – you never have a second chance to make a first impression <p>Participants will leave with the 18 steps check list to effective hiring and on-boarding. They'll have several new strategies to immediately implement</p>
<p align="center">Deadlines on the way to retirement</p> <p>There are a number of benchmarks and deadlines on the way to retirement; age 59.5 lets you access your retirement accounts without penalty, and don't forget to start your required withdrawals at age 70.5! Learn about these and 8 other lesser-known deadlines, starting at age 50, all the way through retirement.</p> <ul style="list-style-type: none"> ✓ Learn about 10 specific financial benchmarks and deadlines. ✓ Take home a Financial Benchmarks handout. 	<p align="center">Finding, Engaging and Keeping Great Employees</p> <p>During this interactive workshop, participants will:</p> <ul style="list-style-type: none"> ✓ Learn about the current and ever-changing hiring landscape ✓ Learn how the cost of turnover impacts their bottom line ✓ Learn how to Retain employees and reduce the costs of turnover and hiring ✓ Market your practice "culture" ✓ Discuss the 18 steps to successful hiring <p>Participants leave with actionable items they can immediately implement in the practice.</p>

Crockpot vs. Microwave Investing

Some people plan ahead, putting a few basic ingredients in the crockpot in the morning so they come home to a hot savory meal. Others may not have had the time or ingredients, and need an end-of-day microwave solution.

Sharon will share client stories and will

- ✓ Discuss the investment equivalents of crockpot and microwave investing – what to do if you have time and a basic income, and the options available if time is running out.
- ✓ Demonstrate the effects of investment timing,
- ✓ Share long-term and catch-up strategies
- ✓ Reveal ideas for turning less than perfect ingredients into the best retirement you can.

Participants will leave with an action plan for getting to retirement, whether they are starting early or catching up.

HR Boot Camp

During this interactive workshop, participants will learn about Employment Law requirements most small business owners are not aware of, which can result in large fines and penalties. Participants learn how to become compliant.

Topics covered include:

- ✓ Employee personnel and medical files - proper contents and storage
- ✓ New Form I-9 requirements and existing common errors that can result in fines up to \$2186 per error
- ✓ Pay practice pitfalls that are getting a lot of employers identified for Department of Labor audits, fines and penalties.
- ✓ The importance of having a current and compliant Employee Handbook. Social media polices and the NLRA (National Labor Relations Act) requirements are highlighted.
- ✓ The benefits of employee engagement – reduced turnover costs and increased profits.

Participants leave with actionable items they can immediately implement back at their organizations.