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# An exit strategy is more than a sale. How well planned are you?

Tuesday 15<sup>th</sup> June - **Fareham**

Thursday 1<sup>st</sup> July - **Exeter**

You have probably spent your working life building your practice, providing a life style and wealth for you and your family, but how do you know if your desired post practice lifestyle is achievable?

The transition from practice owner requires preparation and planning. Are you confident you have thought about all the bases that you need to cover?

Everything you need to know to maximise the sale potential of your practice and prepare the path for your desired retirement. If you plan to sell your practice within the next five years, you should plan to attend this seminar.

Join our team of four leading specialists' dental providers to discover how to plan a successful exit strategy and work towards achieving your desired lifestyle.

This event is sponsored by



**Patient Plan Direct**

"Your Patients...Your Plan"

PPD offer a simple, efficient and cost effective way to administer practice branded dental plans. We offer one straightforward product bundle which includes direct debit collection, enhanced dental accident insurance and a secure administration system to view, create and service patient accounts. PPD gives your dental practice more of the revenue generated from your patients.

# One day – four specialists.

## Introducing the experts

**TAYLOR ROBERTS**  
CHARTERED ACCOUNTANTS

### Tax Management

Bim Fazackarley is a partner in Chartered Accountants, Taylor Roberts a firm specialising in the Dental Sector, with offices in Hampshire and Buckinghamshire. Delegates should leave with a more informed knowledge on the potential to maximise the tax benefits on any sale.

**rhw**  
solicitors

**Heritage**  
financial life planners  
to the dental profession

### Financial Planning

Directors of Heritage Financial Advisers, Suzanne Allen and Peter Dunn, use their 50 combined years in the financial services industry – 22 of which have been in the dental sector – to provide personal and astute financial planning advice to members of the dental profession. Their presentation will galvanise delegates into identifying their goals, dreams, and aspirations and plan an investment strategy to achieve the freedom they want in life.

**Frank Taylor and Associates**  
THE LEADING INDEPENDENT VALUERS AND SALES AGENTS TO THE DENTAL PROFESSION

If you are considering selling your practice but are a little unsure as to how to obtain the best financial outcome, we invite you to hear what our panel of specialists have to say.

### **Legal Know How**

Chris Pomfret is an experienced commercial property lawyer and leads the rhw dental law team. Martyn Whiteman is the firm's senior partner with a considerable wealth of experience having acted for dentists for more years than he wishes to remember. Both of them specialise in assisting dentists on a whole range of issues, including dental practice acquisitions and disposals. Today, they will be advising on how to deal with the legal complexities involved in selling a dental practice.

### **Selling your practice**

Chris Strevens and Andy Acton are directors and co-owners of Frank Taylor and Associates – the leading independent valuers and sales agents to the dental profession. Over the years they have often come across dental practitioners who don't know how or who have left it too late, to influence the value of their practice. This presentation will leave delegates in a stronger position to exploit their practice's potential for sale.

## Learning outcomes

### **Making the most of your sale**

Find out how to influence the worth of your dental practice by learning to identify the principles constituting a good sale. Discover how to identify the right market for your practice.

### **Taxation and selling strategies**

Understanding the tax implications of selling a dental practice and hear about the various tax reliefs available on a sale. Find out how incorporation issues influence the tax strategy for selling.

### **The legal intricacies of selling**

Discover the hidden traps of a typical sale that can undermine a favourable outcome. Find out how to best prepare for sale, what facts to be kept confidential and why it is advantageous to use a specialist dental lawyer.

### **Pursue a planned approach to achieve your desired retirement**

Discover how cohesive planning and the decisions you take in the five years leading to retirement will determine your quality of life in later years.

# Planning a successful exit strategy delegate form

## Single delegate rate = £150 (incl VAT)

Two or more delegates will get a discount of 20% = £130 (incl VAT) per delegate

Title:	Forename:
Surname:	
Status: Principal/Practice Manager/Other (please specify)	
GDC registration number:	
Practice name:	
Address:	
Postcode:	
Email:	
Contact Telephone number:	

I would like to reserve  places at the Exit Strategy seminar which takes place at  on

### Dates and Venues:

**15.06.10** The Wessex Dental Specialist Centre, 11 The Gardens, Broadcut, Fareham, Hants, PO16 8SS

**01.07.10** The Rougemont Hotel, Queen Street, Exeter, EX4 3SP

**Fees:** Course fees include: VAT, refreshments, buffet lunch and any handouts.

Brookmans Park, Hertfordshire. AL9 7QR. On receipt, confirmation and the agenda will be provided.

Please indicate any special dietary requirements

**Cancellations:** We regret that seminar funds are not refundable for cancellations received less than seven days before the event

**Payment:** Cheques made payable to Frank Taylor and Associates and posted with the above details to Frank Taylor and Associates Ltd., 1 Bradmore Building, Bradmore Mews,

**Registration:** From 9.15am – seminar starts promptly at 10.00am and concludes at 4.30pm

**Credit card:** Call us on 08456 123 434