

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

July 3 – London

July 10 – Fareham

The transition from practice owner to retiree requires preparation and planning – are you confident you know all the bases that need covering?

You have spent your working life building your practice to provide wealth for you and your family, but do you know if your desired post-practice lifestyle is achievable?

You probably have no experience of selling a business, but you will be hoping to leverage the best price from selling – are you confident you can influence the best outcome?



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**Frank Taylor and Associates**

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AND DISCOVER HOW TO PLAN AN EXIT STRATEGY THAT ACHIEVES  
YOUR DESIRED LIFESTYLE

# One day. **Five specialists.**

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 five years, plan to attend this seminar.

## INTRODUCING THE EXPERTS . . .



### WEALTH MANAGEMENT

With a heritage dating back to 1869, Williams de Broë is one of the UK's leading firms of investment managers. Associate investment director, Tom Rich, is based in Bournemouth and has responsibility for managing £55 million of clients' assets, while London-based colleague, Tony Albery, has more than 35 years' experience in the industry, 9 of which have been with Williams de Broë. Delegates will leave with much to consider regarding how to best manage their wealth portfolio.



### TAX MANAGEMENT

Greg Penfold and Ian Simpson are partners at Humphrey & Co accountants, an established firm with a specialist interest in the dental sector, based in Eastbourne and Hove. Members of NASDA and the ASPD, their combined tax and accountancy experience means delegates will leave more informed about how to leverage tax benefits from the sale.



### FINANCIAL PLANNING

Directors of Heritage Financial Advisers, Suzanne Allen and Peter Dunn, use their 50 combined years in the financial services industry – 20 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 to plan an investment strategy that fulfils their goals for retirement.



### SELLING YOUR PRACTICE

Chris Strevens is a director and co-owner of Frank Taylor Associates – the leading independent valuers and sales agents to the dental profession. Chris and his colleagues often come across dental practitioners who don't know how, or who have left it too late, to influence the value of their practice. His presentation will leave delegates in a stronger position to exploit their practice's potential for sale.



### LEGAL KNOW-HOW

Chris Pomfret is an experienced commercial property lawyer and leader of the dental law team at Howell Jones Solicitors. Martyn Whiteman is a founding member of ASPD and a lawyer of 25 years' experience. They assist dental clients on matters of acquisition, disposal, expense-sharing and other arrangements and their presentation will enlighten delegates about the complexities of sale.

## Learning outcomes

### Making the most of your sale

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

### Your money and the global markets

Learn more about what has influenced the global economic decline and hear what the experts are predicting for the markets and the economy. Discover how you can take advantage of discretionary management services.

### Taxation and selling strategies

Understand the tax implications of selling a dental practice and hear about the various tax reliefs available on 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 should 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 up to retirement will determine your quality of life in later years.

# BOOKING FORM

## Planning a successful exit strategy

Single delegate rate: £99 + VAT

Title \_\_\_\_\_ Surname \_\_\_\_\_

Forename \_\_\_\_\_

GDC registration number \_\_\_\_\_

Practice name \_\_\_\_\_

Address \_\_\_\_\_

Postcode \_\_\_\_\_

Email \_\_\_\_\_

Contact telephone number \_\_\_\_\_

**Please tick:** I wish to attend: LONDON July 3  FAREHAM July 10

**Enquiries:** For any enquiries, changes to delegate information, or special dietary requests, please contact us on the number below.

### Venues:

THE CHARING CROSS HOTEL, THE STRAND, LONDON, WC2N 5HX **3rd July**

THE WESSEX DENTAL SPECIALIST CENTRE FAREHAM **10th July**

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

**Special dietary requirements:**  Specify \_\_\_\_\_

**Payment:** Cheques for £113.85 (per delegate) should be made payable to Howell Jones LLP and sent to the address below. Please photocopy this form for additional delegates. On receipt, confirmation and the agenda will be provided.

**Cancellation:** We regret that seminar funds are not refundable for cancellations received less than 72 hours prior to the event.

**Registration:** From 9.15 am. The seminar begins promptly at 10.00 am and concludes at 4.00 pm.

**Contact:** Dental Seminars Team, Howell-Jones LLP, Ranger House, Walnut Tree Close, Guildford, Surrey GU1 4UL. Telephone: 01483 540545.