

Creating Wealth in Your Dental Practice

An invitation to a roundtable series

DATES & LOCATIONS

Wednesday, October 23 | 6:30 p.m. – 8:30 p.m.

Granite Links Country Club
100 Quarry Hills Drive, Quincy, MA 02169

Friday, November 8 | 9:00 a.m. – 11:00 a.m.

Sheraton Hotel
39 Dalton Street, Boston, MA 02199

Friday, November 15 | 9:00 a.m. – 11:00 a.m.

Embassy Suites Hotel
550 Winter Street, Waltham, MA 02451

*Admission, drinks and food are complimentary.
Seating is limited.*

HOSTED BY

Robert Graff, Senior Vice President, Wealth Advisor
Patrick McNamara, CFP®, Vice President, Wealth Advisor
Daniel Dubeau, Financial Advisor

The Graff-McNamara Group at Morgan Stanley
600 Longwater Drive, Suite 101 Norwell, MA 02061

CONTACT

Please call Daniel Dubeau at 781-681-4922 or email
daniel.dubeau@morganstanley.com to reserve your place.

You can extract a tooth, but can you extract wealth from your practice?

Please join us for a discussion on creating wealth for dentists. The series will focus on:

- Business Traits of a Million Dollar Practice
- Tax and Retirement Plan Savings
- Financial Planning

GUESTS

Don Khouri, MBA, GCEC

Fortune Management

Joe Vasko, Managing Partner

Cornerstone Group

Retirement Plan Design & Administration

SPEAKERS AND SPONSORS

OCTOBER 23

Fred Spreen, Mainstay Investments, “The Organization Correlation”

NOVEMBER 8

Mike Howard, RS Funds, “Investing Matters: A Crisis in Confidence”

NOVEMBER 15

Jamie Hawes, Mainstay Investments, Paul O’Connell, Principal Funds, “Medicare — What You Need to Know”



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There will be no discussion of, or distribution of written materials relating to, specific products or investments at this presentation.

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