

The Pankey Institute

CREATING MORE FINANCIAL FREEDOM

March 30 - April 1, 2023



ACHIEVING FINANCIAL FREEDOM IS WITHIN YOUR REACH!

This course has no course or educational prerequisites

LECTURE COURSE

Would you like to have less fear, confusion and/or frustration around any aspect of working with money in your life, work, or when thinking about your financial future? If you are already comfortable with Financial Fundamentals, you will find the guidance provided in this workshop will bring you to your next level. This course will pave the way toward a clear and structured financial future.

Dr. Rich Green, Dr. Mark Kleive & Mr. Kelly Brady are passionate about the topic of developing an appropriate financial strategy for your life. Their unique partnership cultivates a distinctive learning opportunity which is both highly engaging and interactive.

Course Objectives:

- Begin to define: Financial Freedom and why it's important.
- Consider: How much is enough?
- Examine: Proven ways to become aware of "hidden" fees and how to keep them low.
- Understand Investments: With balance, diversification and confidence.
- Learn: How to provide a low-cost retirement plan for you and your dental team
- Avoid the perils of "timing the market" and learn why it isn't effective
- Maximize your practice's "financial engine"

Course Information



The Pankey Institute



Starts March 30th at 8:00 AM
Ends April 1st at 2:00 PM



23 Credits



\$2,495



\$250/night with private bath

CONTACT / REGISTRATION

Online

www.pankey.org

Phone

1800.4PANKEY
305.428.5500

Email

info@pankey.org

Faculty



Dr. Richard Green



Dr. Mark Kleive



Mr. Kelly Brady

Faculty Bios:

www.pankey.org/faculty-speakers/department-of-education/

ADA C.E.R.P.® | Continuing Education Recognition Program

The Pankey Institute is an ADA CERP Recognized Provider. ADA CERP is a service of the American Dental Association to assist dental professionals in identifying quality providers of continuing dental education. ADA CERP does not approve or endorse individual courses or instructors, nor does it imply acceptance of credit hours by boards of dentistry. The Pankey Institute designates this activity for 23 continuing education credits. **Concerns or complaints about a CE provider may be directed to the provider or to the Commission for Continuing Education Provider Recognition at ADA.org/CERP.**



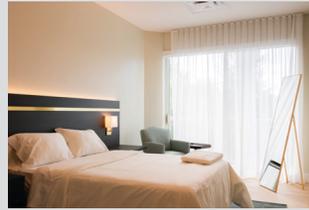
LODGING

Single Occupancy

*\$250 a night
with a private bath*



One Club (Living Room)



Pankey Suites



One Club (Kitchen)

Faculty

Richard Green, DDS MBA

Rich Green, D.D.S., M.B.A. is the founder and Director Emeritus of The Pankey Institute Business Systems Development program. He retired from The Pankey Institute in 2004. He has created Evergreen Consulting Group, Inc. www.evergreenconsultinggroup.com, to continue his work encouraging and assisting dentists in making the personal choices that will shape their practices according to their personal vision of success to achieve their preferred future in dentistry. Rich Green received his dental degree from Northwestern University in 1966. He was an early colleague and student of Bob Barkley in Illinois. He had frequent contact with Bob Barkley because of his interest in the behavioral aspects of dentistry. Rich Green has been associated with The Pankey Institute since its inception, first as a student, then as a Visiting Faculty member beginning in 1974, and finally joining the Institute full time in 1994. While maintaining his practice in Hinsdale, IL, Rich Green became involved in the management aspects of dentistry and, in 1981, joined Selection Research Corporation (an affiliate of The Gallup Organization) as an associate. This relationship and his interest in management led to his graduation in 1992 with a Masters in Business Administration from the Keller Graduate School in Chicago.

REFUND / CANCELLATION POLICY

Most courses require a non-refundable deposit. Requests to cancel must be made in writing.

For courses under \$500, payment is due in full at the time of registration. Cancellations received prior to 90 days before the start of the course will be honored minus a \$50 administrative fee which is non-refundable.

Courses over \$500 require a non-refundable deposit at the time of registration. The tuition balance is due 90 days prior to the start date of the course. Requests received outside of 90 days of the start of the course will be subject to forfeiture of the deposit and 50% of the course tuition, however, the remaining tuition may be transferred to another course date.

No refunds or transfers will be issued for cancellations received within 90 days of the start of the course. Please allow 3 weeks for processing of refunds. Pankey reserves the right to cancel or reschedule any course or scheduled faculty with advance notice to registrant. In no event shall Pankey be liable for any cancellation or change penalties assessed by the airlines, hotels, or other travel related expenses as a result of course date changes or course cancellations including changes related to weather, natural disasters, or other unforeseen events.

MEDIA POLICY

By registering for this course permission is hereby granted, unless a written request is received, to use any and all photographic imagery and video footage taken of the participant at this event and activities pertaining to this event, without payment or other consideration. It is understood that such materials may be published electronically or in print, or used in presentations or exhibitions. Additionally, participants' names and contact information will be shared amongst the other participants and will be made available to the course members unless a written request is received to prohibit this sharing of information.

The L. D. Pankey Dental Foundation, aka The Pankey Institute is a nonprofit corporation organized and chartered in the State of Florida that accepts all registrants regardless of age, race, sex, creed, national or ethnic origin, and it does not discriminate on any such basis with respect to its activities, programs and policies. A copy of the official registration and financial information may be obtained from the Division of Consumer Services by calling toll free (800-435-7352) within the state. Registration does not imply endorsement, approval or recommendation by the state.