



REESE HARPER

DENTISTRY'S FINANCIAL THOUGHT LEADER

Learn the **dentist's** formula to **build wealth faster**
and **make work optional** at an earlier age.



To book Reese for your next event visit: DentistAdvisors.com/speaking

reese@dentistadvisors.com

(800) 890-8095



4 Keys for Dentists

TO ACHIEVE FINANCIAL INDEPENDENCE

Did you know dentists consistently rank among the highest-earning professionals in the nation, yet retire six years later than the average American?

PRESENTATION HIGHLIGHTS

In this interactive presentation, Reese Harper, CFP® highlights the biggest reasons dentists retire later than they should and addresses four key questions every dentist should be able to answer:

How much wealth do I need to make work optional?

Do I have the right mix of assets in my portfolio?

Am I using my income wisely, and saving enough money?

Am I taking the right amount of risk?

OBJECTIVES

Understand what it means to build wealth

Learn why dentists retire later than they should

Use the Elements® table of financial indicators to track financial progress

Calculate Total Term progress toward retirement

DURATION

3 hour full presentation

May be modified to accommodate shorter meeting times

FEATURES

Live audience polling with mobile devices

Elements® booklet for work session

Total Term guidebook

Open Q&A throughout presentation

AUDIENCE

Dentists and spouses



“

“One of the best CE’s I’ve ever attended. Information was presented clearly and openly. Very helpful!”

- Dr. Leslie Murray DENVER, CO



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5 Steps to Better

INVESTMENT PERFORMANCE

The noisy world of investing makes it hard to know where your money should go and feel confident your portfolio is managed the right way.

PRESENTATION HIGHLIGHTS

The truth is one bad investment can erase several years of hard work. In this cut-to-the-chase presentation, Reese Harper, CFP® brings a complicated subject down to earth and explains how to overcome the costs of:

Irrational investor behavior

Hiring the wrong advisor

Underestimating risk tolerance

Poor investment selection

A mismanaged portfolio

OBJECTIVES

Understand how financial markets work

Identify and overcome behavioral tendencies that lead to poor investments

Know the questions to ask when hiring a financial advisor

Learn the principles followed by world-renowned economists

DURATION

2 hour full presentation

May be modified to accommodate shorter meeting times

FEATURES

Behavioral science demonstrations with audience participation

Sample portfolio review

Open Q&A throughout presentation

AUDIENCE

Dentists and spouses



“

Very engaging, smart, and informative! You converted a scary and foreign topic into something my brain can understand.”

- Dr. Gina Marcus CORAL GABLES, FL



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Meet Reese

Reese Harper is the founder and CEO of DentistAdvisors.com, a registered investment advisory firm which focuses exclusively on dentists and specialists. His proprietary planning methodology called Elements® is used by dentists across the country to track their progress toward financial independence.

Reese is the host of the Dentist Money™ Show, a weekly podcast which helps thousands of dentists make smart financial decisions. He is also a regular contributor to major publications in the dental industry, and a popular speaker at dental conventions, continuing education events, and dental districts all over the U.S.

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RECENT PRESENTATIONS

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