

# DENTAL OFFICE MANAGEMENT SUMMIT

The Art & Science of Dental Office Management

## Topics of Discussion:

- Growing Your Business
- IT Solutions for Dental Offices
- Staff Recruitment Strategies
- Social Media Management & Dental Marketing
- Financial Planning
- Employment Law
- AI in Dentistry

Early Bird Price (Till May 30<sup>th</sup>, 2025)  
Staff: **\$149<sup>+tax</sup>** | Dentists: **\$189<sup>+tax</sup>**

Regular Price (After May 30<sup>th</sup>, 2025)  
Staff: **\$199<sup>+tax</sup>** | Dentists: **\$229<sup>+tax</sup>**

Group rate: If your team has 3 or more people, you are eligible to receive a 5% discount

SATURDAY

**12 JULY 2025**

**9:00AM – 5:15PM** | **7 CE** (Category 3)

**WHITE OAKS CONFERENCE RESORT AND SPA**

253 Taylor Rd, Niagara-on-the-Lake, ON L0S 1J0



SCAN FOR  
DETAILS

CE Provider  
**TIA**  
TORONTO IMPLANT ACADEMY

**PACE**  
ACADEMY OF DENTISTRY  
GENERAL DENTISTRY  
PROFESSIONAL APPROACH  
EDUCATION

Toronto Implant Academy (TIA)  
Nationally Approved PACE Program Provider for FAGD/MAGD  
credit. Approval does not imply acceptance by any regulatory  
authority or AGD endorsement. 9-1-2022 to 8-31-2025.  
Provider ID# 355116

palmermediagroup.com  
905.489.1970 Ext.206 | Ext.207  
events@palmerpublishing.com  
seminars@palmerpublishing.com

Organized by:  
**PMG**  
Palmer Media Group

# DENTAL OFFICE MANAGEMENT SUMMIT 2025

## Breakfast & Registration

8:30am–9:00am

Opening Introduction

9:00am–9:15am

Ettore Palmeri, *President, PMG*

Beyond The Resume: Innovative Sourcing & Recruitment Strategies

9:15am–10:00am

Cassandra Moldovan, *Manager, Practice Recruitment Marketing & Events – Dentalcorp*

AI in Dentistry: A Current Perspective

10:00am–10:45am

Dr. Shammick Kotecha

## AM Coffee Break

10:45am–11:15am

How to Get Money Trapped in Your Professional Corporation Out Tax Free

11:15am–12:00pm

David Lipkus, *Financial Security Advisor*

Learn Business Systems and Team Accountability That Supercharge Your Success!

12:00pm–12:45pm

Tala Batarseh, *Dental Practice Consultant*

## Lunch Break

12:45pm–1:45pm

Smarter Practices, Happier Patients: How AI is Reshaping Dental Office Management

1:45pm–2:30pm

Usman Tariq, *Co-founder at Dental Assist Ai*

Brush Up on Employment Law: A Dental Practice's Guide to Managing Your Team

2:30pm–3:15pm

Hani Al-Dajane, *LLB, Dental Practice Consultant*

## PM Coffee Break

3:15pm–3:45pm

Building with IPAC in Mind: Infection Control During Dental Office Construction and Renovation

3:45pm–4:30pm

Ruba Asaad Kawmi, *IPAC Consultant, CDA*

Rajiv (Raj) Chugh, *P.Eng., LEED AP@ BD+C*

Maximize Profit & Minimize Tax: Unlocking Corporate Wealth Strategies for Dentists

4:30pm–5:15pm

Amy Tong, *B.Com CLU CH.F.C. CHS RCIS*

*Lifetime Member, TOT President of A.T. Financial Group Inc.*



## BREAKFAST & REGISTRATION

8:30AM-9:00AM



Ettore Palmeri,  
President, PMG



9:00am - 9:15am

### Opening Introduction

#### About the Speaker:

**Ettore Palmeri, MBA, AGDM, B.Ed., BA**, is the President of Palmeri Media Group; one of the largest dental media providers of print, digital and event solutions in Canada and the world.



Cassandra Moldovan,  
Manager, Practice  
Recruitment Marketing &  
Events – Dentalcorp



9:15am - 10:00am

### Beyond The Resume: Innovative Sourcing & Recruitment Strategies

#### Description:

This course provides a comprehensive overview of Dentalcorp and its commitment to excellence in dental practice management. Participants will be introduced to the Dentalcorp Institute and its continuing education opportunities designed to support professional growth. The course also covers essential recruitment strategies, including how to effectively source candidates and conduct impactful interviews. Additionally, attendees will learn how to enhance their clinic's online presence through strategic branding and gain valuable industry insights to stay competitive in the evolving landscape of dental recruitment.

#### About the Speaker:

**Cassandra** is a bilingual Dental Professional with a background in Operations and Talent Acquisition. She started her career in private practice as a floater and sterilization technician, then progressed into a Treatment Coordinator and ultimately a Practice Manager. After completing her Masters Degree at Schulich School of Business, Cassandra joined Dentalcorp as a Senior Workforce Management Analyst and supported our network of 550+ clinics with scheduling and budgeting labour expenses to better align with their monthly production forecasts and goals. She then transitioned into Talent Acquisition and Campus Engagement. She now acts as the Manager responsible for Recruitment marketing and targeted sourcing events from coast to coast in our network.



Cassandra Moldovan,  
Manager, Practice  
Recruitment Marketing &  
Events – Dentalcorp



**10:00am - 10:45am**

## **AI in Dentistry: A Current Perspective**

### **Description:**

Artificial intelligence (AI) is a rapidly advancing field that has the potential to transform many industries, including healthcare. In recent years, there has been a growing interest in applying AI to dentistry, driven in large part by the increasing availability of digital data. By analyzing large amounts of data, AI algorithms can help dental professionals make more informed decisions and improve patient outcomes. In this presentation, we will explore the current applications of AI in dentistry, including how it is being used in different specialties and general practice.

### **Goals of this Presentation:**

1. Understand what is Artificial Intelligence?
2. Current applications of Artificial Intelligence in Dentistry
3. Benefits and Challenges of Artificial Intelligence in Dentistry

### **About the Speaker:**

**Dr. Shammick Kotecha** is a dedicated dental professional with over two decades of experience in clinical practice and leadership within the dental community. He graduated from the University of Manitoba's Faculty of Dentistry in 2000 and completed his residency at The Hospital for Sick Children in Toronto.

In 2006, Dr. Kotecha purchased SGV Dental, where he has since expanded the practice into a state-of-the-art, 10-operator facility rooted in digital dentistry. His passion for innovation led him to build and later sell Cobblestone Dental Care further solidifying his expertise in modern dental technologies.

A strong advocate for continuing education, Dr. Kotecha served as a Spear Study Club Leader for eight years and is actively involved in professional organizations. He is the President of the Canadian Academy of Restorative Dentistry and Prosthodontics (CARDP) and serves as the Secretary/Treasurer of the Toronto Crown and Bridge Study Club. He has also earned the prestigious Fellowships in both the Pierre Fauchard Academy and the International College of Dentists.

Dr. Kotecha's clinical philosophy centers on digital dentistry and its applications in all aspects of patient care, from restorative and prosthodontic procedures to cosmetic and aesthetic treatments. His commitment to excellence ensures that his patients receive cutting-edge care in a comfortable, technologically advanced setting.



**AM BREAK**

**10:45AM-11:15AM**



David Lipkus,  
Financial Security  
Advisor



**11:15am - 12:00pm**

## **How to Get Money Trapped in Your Professional Corporation Out Tax Free**

### **Description:**

Whole Life Insurance policies are one of the most favourable and underused tax shelters for people with Professional Corporations.

Tax laws permit investment, accumulation and access to cash in a permanent life insurance policy tax FREE. Dentists with their own corporations that use tax free policy contracts held inside the company is among the most effective ways to transfer wealth.

Learn how to create your own personal pension fund using idle cash trapped in your Professional Corporation to fund cash value Whole Life Insurance that enable you to:

- Take money out of a Professional corporation tax free
- Grow investments tax Free
- Access cash via a tax free loan that does not need to be paid back
- Remove cash in Professional Corporation to beneficiaries' tax free

### **About the Speaker:**

**David Lipkus** is The Insurance Guy for Dentists with a deep understanding of the unique challenges and needs of dental professionals. He has dedicated his career to providing Life, Disability and Critical Illness insurance to Dentists across Canada.

His expertise lies in crafting comprehensive insurance strategies from protecting Dentists' from unexpected disabilities that could disrupt their income, to minimization on income trapped in Professional Corporations and creditor proofing.

David's commitment to his clients goes beyond just offering insurance, he is a trusted advisor who takes the time to explain different types of coverage and ensures it is aligned with the individual needs and circumstances of his clients.

David is a joy to work with, he has a friendly, personal approach with an unwavering dedication to his clients' well-being and financial security.

Whether you're a new Dentist just starting your practice an International Dentist starting over in a new country or an experienced professional seeking to safeguard your income, David is the Insurance Guy you can rely on for expert advice and comprehensive insurance solutions.

You can follow David on Instagram @insuranceguyfordentists or on Facebook @theinsuranceguyfordentists



**Tala Batarseh**  
*Dental Practice  
Consultant*

**12:00pm - 12:45pm**

## **Learn Business Systems and Team Accountability That Supercharge Your Success!**

### **Description:**

Ready to take your dental practice to the next level? In this session, you'll learn how to streamline your operations, eliminate confusion, and create a practice that runs smoothly, efficiently, and profitably. By focusing on clear business systems and team accountability, you'll be empowered to lead your practice with confidence and clarity, all while avoiding burnout for both you and your team.

### **What You'll Learn:**

1. **Create Simple, Effective Business Systems:** Learn how to develop clear, easy-to-implement systems that remove the guesswork and improve your practice's efficiency.
2. **Take Control of Your Business:** Discover actionable strategies to boost profitability without overloading yourself or your team.
3. **Clarity and Accountability Lead to Success:** Understand how establishing clarity and accountability is the key to driving sustained success and creating a thriving practice environment.

### **About the Speaker:**

**Tala** is the founder, owner and operator of DenTala. Graduate of York University with a Bachelor of Business Administration and a Certificate of Management, Tala has over 15 years of experience in the dental industry. She has achieved a Certificate of Dental Practice Management from the University of Toronto, accompanied with multiple CE courses in Sales, Treatment Coordination, Executive and Leadership Training. Additionally, she has successfully completed trainings at the University of Toronto for the new IPAC standards. Tala has integrated her theoretical expertise, and industry experience toward helping many dental practices achieve success in their business. Passionate and driven, Tala continues to partner up with dentists opening new practices, or desiring more success out of their existing businesses to help them achieve levels of success beyond their expectation.



**LUNCH BREAK**

**12:45PM-1:45PM**



Usman Tariq  
Co-founder at  
Dental Assist Ai



1:45pm - 2:30pm

## Smarter Practices, Happier Patients: How AI is Reshaping Dental Office Management

### Description:

In an era where efficiency and patient experience are everything, Artificial Intelligence is becoming a game-changer in dental office management. In this forward-looking session, Usman Tariq, Co-Founder of Dental Assist Ai, will explore how clinics can adopt AI to automate tasks and transform their operations.

You'll learn how modern practices already use AI-powered tools like voice-based receptionists, mobile communication apps, and website chat widgets to handle missed calls, reduce patient wait times, and improve new patient conversion.

But more importantly, Usman will spotlight one of the most impactful features: the Personalized AI Assistant. This intelligent system is trained on each clinic's specific workflows, FAQs, and service categories (e.g., treatments, office info, insurance policies), becoming a 24/7 digital team member that gives accurate, customized answers.

We'll also dive into what's coming next, from AI-driven follow-up and recall outreach, billing assistance, and re-engagement of dormant patients.

### Attendees will walk away with:

- A real-world view of how AI is already working in clinics
- Insights on personalizing automation for your unique practice
- A roadmap to adopt future AI workflows with confidence

Whether you're curious, cautious, or already experimenting with tech, this session will give you the knowledge and strategy to move forward with clarity.

### About the Speaker:

**Usman Tariq** is the Co-Founder of **Dental Assist Ai**, an AI-driven platform transforming how dental clinics engage with patients and streamline day-to-day operations. With a deep background in software development and startup leadership, Usman has built innovative, user-friendly tools for healthcare teams who are ready to work smarter.

At Dental Assist Ai, he's developing a suite of AI solutions tailored for dental practice, including an AI voice receptionist, a patient engagement mobile app, and a plug-and-play website widget. One of the most powerful features is the **Personalized Assistant**, which acts like an intelligent front-desk team member. It's trained on the clinic's knowledge base and understands categories like treatments, location info, and policy-specific responses.

Beyond what's already live, Usman is pushing the boundaries of what AI can do for dental offices, introducing future capabilities like automated recall campaigns, insurance and billing support, and personalized reactivation flows.

His mission is simple: help clinics grow, scale, and serve better, without burning out their teams.



*Hani Al-Dajane  
LLB, Dental Practice  
Consultant*

**2:30pm - 2:30pm**

## **Brush Up on Employment Law: A Dental Practice's Guide to Managing Your Team**

### **Description:**

In this hands-on seminar, Hani will provide an overview of the most common employment law issues dentists face—many of which they may not even realize they're violating. Dental practice owners and managers will leave with a clear list of what to do, and what to avoid, to ensure their practice is compliant with employment law.

The session's primary objective is to help attendees recognize legal risks in their practices and understand the latest updates in employment law. Hani will break down topics like termination, discipline, workplace discrimination, bonuses, and more, giving participants the tools they need to avoid costly mistakes.

Practical takeaways will include actionable steps for improving workplace policies, handling employee relations, and maintaining legal compliance.

### **Key takeaways include:**

- Case studies of real-life examples that can happen in your dental practice
- A comprehensive list of common employment law pitfalls and how to avoid them
- Clear guidance on handling employee disputes and legal documentation
- Strategies to protect your practice from potential legal risks while fostering a positive work environment
- Anonymous Q/A where you will be able to write down a question where we can discuss in the session.

This seminar will empower dental practice owners and managers to confidently navigate the legal landscape and protect their businesses.

### **About the Speaker:**

**Hani Al-Dajane** is a seasoned lawyer at Emerge Law, specializing in the legal needs of dental professionals. Hani provides expert counsel to dentists on matters such as buying and selling practices and navigating employment laws. He is committed to helping dental professionals make informed decisions that protect their practices and teams.

As the head of Emerge Law's Dental Group, Hani leads a team focused on delivering tailored legal solutions for the dental industry. Together with his team, he also launched Dental Assyst by Emerge Law, a unique hybrid platform offering podcast-style discussions, course content, and resources designed to educate and support the dental community.

Hani's unique ability to combine his legal expertise with a deep understanding of the dental field has made him a trusted advisor to dentists. His guidance empowers dental professionals to grow their businesses while ensuring compliance with ever-evolving laws and regulations.





PM BREAK

3:15PM–3:45PM



Ruba Asaad Kawmi  
IPAC Consultant, CDA

3:45pm - 4:30pm

## Building with IPAC in Mind: Infection Control During Dental Office Construction and Renovation

### Description:

This session focuses on integrating Infection Prevention and Control (IPAC) standards during the planning, construction, or renovation of dental clinics. Many practices overlook IPAC requirements during these phases, leading to costly retrofits, non-compliance issues, and inspection challenges.

Raj and his team at Dental Construction offers a one stop shop design & construction experience from concept to completion. We are here to help with your projects of expanding or modernizing existing dental offices and building new dental clinics either on owned or leased properties.

Our team specializes in dental construction and knows IPAC requirements, risks with X-ray radiation leakages, selecting proper construction materials such as lead or antimicrobial materials for sterilization & other areas.



Rajiv (Raj) Chugh  
P.Eng., LEED AP® BD+C



### About the Speakers:

**Ruba Asaad Kawmi (IPAC Consultant, CDA)** is a certified Infection Prevention and Control (IPAC) Consultant with a strong background in dental healthcare. With over 9 years of clinical experience, she has worked closely with dental teams across Ontario to implement and maintain infection control standards that meet regulatory requirements. Ruba's expertise spans staff training, policy development, audits, and clinic setup consulting. She also supports dental offices during inspections and helps build strong infection control programs tailored to each practice.

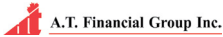
Ruba's work is guided by a practical approach—making infection control simple, effective, and achievable for every team. She regularly collaborates with dental offices to deliver training and develop systems that improve compliance and patient safety. Her focus now includes supporting dental offices during construction and renovation projects to ensure IPAC is built into the foundation of every practice.

Ruba shares real-world insights that help dental teams stay up to date, confident, and inspection-ready.

**Rajiv (Raj) Chugh, P.Eng., LEED AP® BD+C,** is the President & CEO of Dental Construction. He has been working in health care construction industry in Canada for more than 25 years and have extensive experience ranging from planning, design and construction management. His passion for dental construction management helped complete many challenging and sensitive projects on schedule and on budget including construction in occupied spaces. For last 6 years Raj has committed himself to working on Dental Clinic projects only throughout Ontario. Raj holds a mechanical engineering degree and is a registered Professional Engineer in the province of Ontario. Raj is also LEED (Leadership in Energy and Environmental Design) Accredited Professional in Building Design and Construction.



**Amy Tong**  
*B.Com CLU CH.F.C.  
CHS RCIS  
Lifetime Member,  
TOT President of A.T.  
Financial Group Inc.*



**4:30pm - 5:15pm**

## **Maximize Profit & Minimize Tax: Unlocking Corporate Wealth Strategies for Dentists**

### **Description:**

Dentist often find themselves earning more—but keeping less—due to inefficient tax structures and outdated financial strategies. This session dives into how practice owners or DPC can significantly reduce tax drag and maximize retained earnings by applying corporate-level wealth planning principles typically reserved for high-net-worth individuals.

We'll explore the growing burden of passive income tax (50.7%), the corporate tax rate increases triggered by investment income, and the crushing double-taxation trap of dividends and estate disposition. Instead of leaving wealth vulnerable to erosion, we'll introduce corporate-owned tax-exempt PAR policy and immediate financing as strategic solutions.

You'll see how redirecting funds from traditional taxable investments into these tax-sheltered vehicles can unlock more tax-free legacy value, reduce annual dividend tax costs by over \$1 million, and convert passive tax liabilities into leveraged retirement income. Through real-world case illustrations, we'll break down how to defer taxes, grow wealth within the corporation, and access capital efficiently through collateralized lines of credit—all while maintaining liquidity and flexibility for higher-return opportunities like real estate or business reinvestment.

By the end of this session, you'll understand how to stop overpaying the CRA and start optimizing your practice's earnings for growth, retirement, and generational legacy—on your terms.

### **About the Speaker:**

**Amy Tong** is a distinguished financial planner with over 20 years of experience in the financial services industry. She is recognized as a Lifetime Top of the Table member of the Million Dollar Round Table (MDRT), a prestigious designation that highlights her exceptional expertise and achievements. Specializing in tax and financial planning for dentists and healthcare professionals, Amy has helped numerous clients optimize their financial structures, maximize after-tax income, and secure tax-free estate payouts.

# A SINCERE THANK YOU TO OUR SPONSORS & EXHIBITORS



A.T. Financial Group Inc.

DentalAssist.ai



dentalcorp



**DENTAL  
CONSTRUCTION**

CONSTRUCTION EXPERTS IN DENTAL INDUSTRY

**HEAPS & DOYLE**



Your Partner in Dentistry



Studio 6

CLINIC BUILD & DESIGN

the  
**Insurance**   
**Guy** for dentists

# Dental Office Management Summit

Early Bird Price (Till May 30th, 2025) Staff: \$149+tax | Dentists: \$189+tax

Regular Price (After May 30th, 2025) Staff: \$199+tax | Dentists: \$229+tax

Saturday, 12<sup>th</sup> July, 2025

## To Register

**Online visit:** [www.palmerimediagroup.com](http://www.palmerimediagroup.com)

**Fax Form to:** (905) 489-1971

**Email Form to:** [events@palmeripublishing.com](mailto:events@palmeripublishing.com) / [seminars@palmeripublishing.com](mailto:seminars@palmeripublishing.com)

**Mail Form to:** Palmeri Publishing Inc.

35-145 Royal Crest Court, Markham ON L3R 9Z4

**Call:** (905) 489-1970 ext. 206/207 or 1-866-581-8949 ext. 206/207

First Name : Dr. \_\_\_\_\_

Last Name : \_\_\_\_\_

Company : \_\_\_\_\_

Address : \_\_\_\_\_

City : \_\_\_\_\_ State/Prov : \_\_\_\_\_ Zip/Postal Code : \_\_\_\_\_

Phone : \_\_\_\_\_ Cell : \_\_\_\_\_ Fax: \_\_\_\_\_

Email : \_\_\_\_\_

Please note that by giving us your email, you are giving Palmeri Publishing Inc. permission to send you emails/CEM's. We respect your privacy and you can unsubscribe from our emails at anytime.

Are you an AGD Member?    Yes    No

Membership # \_\_\_\_\_

Payment Information :

VISA    MasterCard    Amex

Amount Authorized : \_\_\_\_\_ CVV no: \_\_\_\_\_

Card Number : \_\_\_\_\_ Exp.  
Date \_\_\_\_\_

Card Holder Name : \_\_\_\_\_ Signature : \_\_\_\_\_

Do you have any food restriction (vegetarian, vegan etc.) or do you have any food allergy?

Yes    No      If yes, please specify : \_\_\_\_\_

### Cancellation/Refund Policy:

Participants cancelling will not receive any refunds.

Costs incurred for travel and hotel accommodation remain the responsibility of each participant.

I accept the Cancellation/Refund Policy



# ***BE PART OF SOMETHING SPECIAL***

Free Admission | World-Renowned Speakers | CE Points  
Cocktail Party with Entertainment | Free Parking

**FRIDAY**

**NOVEMBER 7, 2025**

**TORONTO CONGRESS CENTRE**