

the cutting edge

— The Official Magazine of the Santa Clara County Dental Society —

Spring 2026





the cutting edge

— The Official Magazine of the Santa Clara County Dental Society —

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SCCDS MISSION AND VISION

The mission of the Santa Clara County Dental Society is to assist our member dentists with their practice needs and to improve the oral health of our community. Our vision is to be the leader in providing innovative valuable services to our dentist members and in working to improve the oral health of the community we serve.

POLICIES

Editorial Content: It is the policy of SCCDS to accept articles in its magazine and website as vehicles for the fair sharing of information and opinion germane to and effective and useful for members in their practices. Members and vendors may submit articles. The Editor and Executive Director are authorized to reject an article if it is inappropriate, unnecessarily controversial, written in poor taste, self-promoting or inaccurate. Articles deemed questionable by our Editor and/or Executive Director may be reviewed by the Communications Committee and voted on, with a majority ruling. An author whose article has been rejected may assert their option to present to our Board of Directors for review and a final decision. Opinions published in The Cutting Edge shall be labeled as such and only represent the opinion of the author. SCCDS does not condone, reject, endorse or support published opinions. Members and vendors may author only one article per issue and no more than four in a year. Exceptions are members of the Communications Committee, the Executive Committee and committee chairs. Legislative articles must be reviewed by the Santa Clara County Members Political Action Committee and submitted by that committee chair. The article must be educational without taking a position. Photos must be originals taken and submitted by the author. If there is no provenance for the photo, permission must be received from the photographer or the photo will not be used. Staff and the Editor reserve the right to edit an article for grammatical and spelling errors, sentence or paragraph construction and length, remembering the goal of maintaining the message and tenor of the article.

Advertising Content: It is the policy of SCCDS to accept advertising in its printed publications and website as a service to members to inform them about services, opportunities and products germane to and effective and useful in their practices. Such advertising must be factual, dignified and adhere to the ethical guidelines for advertising established by the ADA Principles of Ethics and Code of Professional Conduct, the CDA and the advertising guidelines of the Dental Board of California. Advertising must be related to dentistry or provide a service or benefit to members. All advertisements submitted are subject to review by the Editor, Executive Director, or President. SCCDS reserves the right to accept or reject advertising for non-adherence to the Code or this policy. Such decisions will be non-discriminatory with regard to gender, religion, age, race or ethnicity.

Anti-discrimination: The Santa Clara County Dental Society is made up of members of diverse backgrounds and orientations. We are proud of our long tradition of mutual professional respect, tolerance and equality. We will always support our members and the communities we serve regardless of their race, country of origin, age, gender, religious background or sexual orientation. SCCDS is committed to fighting racism in all its forms. We are speaking out against all forms of violence, discrimination, xenophobia, racism, hate and harassment. We welcome dentists from all backgrounds as members and to be active in our association.



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Contents

Honoring Our Momentum, Shaping What Comes Next	6
by Shadi Kanaan, Executive Director	
News & Notes	8
2025 Recap and 2026 Outlook	17
Another Amazing Year! (Pictorial)	18
Your Society. Your Profession. Your Future: SCCDS at Work	20
by Monica Wu, DDS President, Santa Clara County Dental Society	
Event Calendar	26
2026 Sponsors	27
SCCDS 2025 Financial Summary	28
Katie Lam, Deputy Director of Finance	
FEATURED ARTICLE: Where Medicine Meets the Mountains: A Dental Mission in Bhutan	32
by Logan Lehnert	
SPONSORED ARTICLE: Why Dentists Benefit from Coordinated Financial, Tax, and Practice Planning	36
by Sheri Pan, CEO & Founder @ Pantheon Wealth Planning CFP®, Masters in Taxation	
SPONSORED ARTICLE: 2026 Retirement Plan Changes Every California Dentist Should Understand	36
by Laura Phillips, E.A., CEO of The Phillips Group	
Sponsor Index	
TDIC - The Dentists Insurance Company	4
Tiret + Company CPAs	10
Henry Schein Dental Practice Transitions	10
Analgesic Services, Inc.	10
Dandy	10
M.H. Sadeghi, DDS, Anesthesiologist	11
Glidewell	12
Dental CPA	13
Overjet	13
Arkalign	30
Equitable Advisors	30
Jazz Imaging	31
Western Practice Sales	31
Revolve Practice Transitions	35
CGI, Inc/Hello Nation	35
Pantheon Wealth Planning	37
US Bank Practice Finance	38
Shofu	39
Dental & Medical Counsel, PC	39
Lasso MD	42
The Phillips Group	42
Claio AI	42
Professional Practice Sales	43

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2026 Speakers



February 12: "Early Management Solutions for Challenging Dental Anomalies" with Heesoo Oh, DDS, MSD, PhD



March 12: "Full Coronal Monobloc Composites Made Easy" with Patrick Roetzer, DDS



April 9: "My 3D Digital Journey: 3D Printing and Practice Improvement" with Jenny Apekian, DDS



May 14: "Treating Patients with Special Health Care Needs in Private Practice" with Sampada Deshpande, DDS, FACD



September 10: "Minimally Invasive Rehabilitation: A Healthier, Less Costly and More Predictable Approach" with Jose Luis Ruiz, DDS



October 8: "The Influence of Prosthetic Designs on Peri-implant Tissue Health" with Guo-Hao (Alex) Lin, DDS, MS



November 12: "Dentistry 2.0: See Earlier, Treat Smarter, Restore Beautifully" with Michael Miyasaki, DDS

Fees:

Non-CDA member DDS: \$90; Non-DDS: \$55;
Life & Retired Members: In person - \$25/Online - Free

In-Person Attendance

SCCDS General Membership Meetings are prepaid for all current members. Hybrid meetings take place at the SCCDS office (1485 Park Ave., San Jose) and online via Zoom. In-person attendance is limited to the first 60 registrants. Please allow time for check-in and parking. In-person attendees enjoy cocktail hour, dinner, and a bonus Q&A session as a member benefit. Advance registration is required—register at sccds.org or call 408-289-1480 by the Tuesday before the meeting.

Online Attendance

Online events are hosted on Zoom, with a unique access link sent 24 hours before the event. If you don't receive the email, check your spam folder before contacting our office. The email will come from Zoom, not SCCDS. We recommend updating Zoom to the latest version and using a wired internet connection for the best experience. SCCDS is not responsible for technical issues related to Zoom, internet speed, or video quality. Online session starts at 6:30 PM. To receive CE credit, you must log in at the start time and stay for the entire program.

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These courses provide 2 units of Core/Live Continuing Education approved by the Dental Board of California. Keyword verification is required for credit.



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Honoring Our Momentum, Shaping What Comes Next

by Shadi Kanaan,
Executive Director



Each year offers an opportunity to pause, reflect, and realign. This Recap & Outlook issue of *The Cutting Edge* magazine is designed for that purpose: to look back on the moments, milestones, and collective efforts that shaped 2025, while setting our sights firmly on the opportunities and challenges ahead in 2026.

Dentistry continues to evolve at a rapid pace. Economic pressures, workforce shortages, regulatory complexity, and accelerating technology changes have made practice ownership and leadership more demanding than ever. At the same time, innovation, collaboration, and shared purpose remain powerful forces within our profession. This issue reflects both realities. We celebrate what SCCDS and its members accomplished together in 2025 and prepare for the thoughtful, strategic work ahead.

Looking Back: A Year of Connection and Engagement

2025 was a year defined by participation and presence. SCCDS events brought members together for continuing education, peer connection, leadership development, and advocacy. In our *"Another Amazing Year"* pictorial (pg.17) we try to capture the energy and engagement of those moments as a reminder that even in a demanding profession, community matters.

Alongside this retrospective, you'll find our *2026 Calendar of Events* (pg. 26), offering a clear view of the year ahead. Whether your focus is earning CE, strengthening your team, expanding your professional network, or staying informed on regulatory and business issues, SCCDS programming continues to be designed with flexibility, relevance, and value in mind.

This issue also recognizes the generous sponsors whose partnership helps make SCCDS programs possible (pg. 27). Their support directly contributes to the quality and accessibility of education, events, and member services, and we are deeply grateful for their continued commitment to our dental community.

Planning with Purpose: Strategy, Stewardship, and Sustainability

A unifying theme throughout this issue is intentional planning. SCCDS staff and leadership are looking beyond immediate demands to ensure long-term strength and relevance for both individual practices and the Society as a whole. That perspective begins with SCCDS's own strategic direction.

In her article *"Your Society. Your Profession. Your Future- SCCDS*

at Work" (pg. 20) SCCDS 2026 President Dr. Monica Wu reviews our newly developed Strategic Plan and outlines how SCCDS is positioning itself to meet the evolving needs of members through 2026 and beyond. Developed with extensive member input, the Strategic Plan focuses on strengthening continuing education, advancing insurance advocacy, supporting workforce development, expanding engagement opportunities, and ensuring long-term financial stability. Dr. Wu's article provides clarity on where our dental society is headed and why these priorities matter to members.

Strategic vision must be supported by sound stewardship, and financial transparency plays a critical role in that foundation. In our *Annual Financial Report* (pg. 28), Katie Lam, SCCDS Deputy Director of Finance, offers members a clear and comprehensive view of the Society's financial health. The report reflects SCCDS's commitment to responsible fiscal management, sustainability, and thoughtful reinvestment in mission-critical programs and services.

Together, these articles underscore an essential truth: progress is not accidental. It is the result of clear priorities, disciplined planning, and accountability at every level. By aligning strategic goals with financial stewardship, SCCDS is ensuring it remains a strong, responsive organization well-positioned to serve

members today and adapt for the future.

Dentistry Beyond the Practice

While planning and performance are essential, dentistry is also a profession rooted in service. That broader sense of purpose is powerfully reflected in the contribution from SCCDS Past President (2003) Dr. Rich Kao and written by Logan Lehnert, a student at Colby College. Logan shares his experience participating in a charitable dentistry mission in Bhutan.

The article, "*Where Medicine Meets the Mountains: A Dental Mission in Bhutan*" (pg. 32) offers a reminder that the skills dentists use every day have impact far beyond the walls of a practice. In a profession often dominated by production metrics and operational pressures, this reflection re-centers the human side of dentistry: service, compassion, and global responsibility.

Preparing for the Future: Financial and Practice Planning Insights

Two articles in this issue focus on practical, actionable guidance for navigating upcoming changes, particularly in the areas of financial planning, taxation, and practice management. In "*Why Dentists Benefit from Coordinated Financial, Tax, and Practice Planning*" (pg. 36), Sheri Pan, Founder & CEO of Pantheon Wealth Planning highlights the advantages of aligning these disciplines rather than treating them as separate silos. This

approach that can reduce risk, increase clarity, and support smarter decision-making over the course of a career.

Complementing that perspective, the article "*2026 Retirement Plan Changes Every California Dentist Should Understand*," (pg. 40) by Laura Phillips, E.A. and CEO of The Phillips Group, breaks down key regulatory updates and explains what they mean for dentists planning for retirement. As laws and financial tools evolve, staying informed is essential not just for compliance, but for protecting long-term financial well-being.

These pieces reinforce a central theme of this issue: the future rewards preparation. In a profession where clinical excellence is only one piece of the puzzle, informed planning and trusted expertise are critical tools for long-term success.

One Conversation, Many Perspectives

Each article in this issue stands on its own, but is part of a larger conversation about where dentistry is headed and how SCCDS is supporting its members through change. As you read this issue, we invite you to reflect on the lessons of 2025 and consider how they inform the choices ahead. The year behind us demonstrates what's possible when members are engaged and leadership is aligned. The year ahead offers new opportunities to grow, to adapt, and to strengthen the Society that supports you. 🌈



news & notes

SCCDS Represented in new Future of Dentistry Taskforce

Drs. Robert Shorey and Dhruva Gurjar are serving as SCCDS representatives on the statewide Future of Dentistry task force, chaired by Dr. Natasha Lee. The initiative has generated significant interest, reflecting how strongly dental professionals across California feel about shaping the long-term future of the profession.

The inaugural meeting began with introductions, highlighting the impressive breadth of experience within the group. The task force includes young dentists, seasoned practitioners, public health professionals, educators, students, and private practice owners. Many members bring prior leadership experience at the component, state, or national level. This diversity ensures that multiple perspectives and practice models are represented as the work moves forward and that recommendations are grounded in real-world experience.

Leadership presented a structured three-year framework to guide the initiative.

- **Year One** focuses on organization and structured information

gathering. Members will share insights from their own experiences, while invited experts from healthcare, business, and other relevant sectors will provide additional perspective. The goal is to develop a shared understanding of the key challenges and opportunities facing dentistry today, from workforce dynamics and access to care to evolving technology and patient expectations.

- **Year Two** shifts to analysis and solution development. The task force will divide into focused workgroups to examine themes identified in Year One and develop practical recommendations. These groups will regularly report progress back to the full task force to ensure collaboration and alignment across topic areas.
- **Year Three** moves into initial implementation of prioritized strategies. Leadership emphasized that meaningful, lasting change requires careful thought, broad input, and long-term planning rather than quick fixes.

Communication will be essential throughout the process. With more than 100 applicants statewide — including over 15 from the Santa Clara component — there is strong interest in engagement beyond the appointed task force members. Participants will serve as ambassadors, sharing updates locally and encouraging dialogue within their communities.

Planned communication efforts may include regular updates in CDA newsletters, coverage in the CDA Journal, and the development of a dedicated Future of Dentistry page on CDA.org where members can receive updates, access selected materials from expert speakers, and contribute their ideas. CDA town halls are also being considered to encourage broader member participation. An interactive “SparkPark” experience at CDA Presents is planned to gather additional ideas about the future of dentistry and potentially expand into a virtual platform.

The next in-person meeting will take place in Sacramento on Friday, April 17, as this important work continues. 🌈

Rethinking SCCDS GMMs

At a time when it's easier than ever to stay home, log in, and avoid traffic, the Santa Clara County Dental Society (SCCDS) is making a renewed commitment to something that can't be replicated on a screen: the energy, connection, and camaraderie of gathering together in person.

This year, our General Membership Meetings are evolving with intentional upgrades designed to reward the members who make the effort to show up, reconnect, and strengthen our professional community.

A Better Seat at the Table

Let's start with dinner. A meeting worth attending in person should feel like an experience, not an obligation. That's why we're elevating the quality of our catered dinners each month. Expect more thoughtful menus, higher-quality ingredients, and meals that feel special enough to build an evening around.

Breaking bread together has always been one of the simplest and most powerful ways to foster connection. When you sit down across from a colleague, whether a longtime friend or someone you've never met, you create space for conversations that don't happen over email or in passing at a lecture. We want our dinners to feel worthy of that time.

Door Prizes That Spark Joy

We're also bringing a little more fun into the room. At our February meeting, held in celebration of Lunar New Year and the Year of the Horse, members were delighted by the adorable plush horses we gave away as door prizes. They were unexpected,

whimsical, and surprisingly coveted.

Also in February, one lucky member won a romantic dinner for two at Le Papillon in Saratoga. It was a fitting prize for Valentine's Day and a reminder that your membership can extend beyond CE credits and committee meetings.

These giveaways are proof that a small, thoughtful touch can create a shared moment of joy. We're carrying that spirit forward.

More Than a Meeting

We understand the temptation to stay cozy at home. After a long day in the operatory, battling traffic and carving out an evening commitment isn't always easy. But organized dentistry has always been built on relationships. The strength of our Society depends not just on attendance numbers, but on the depth of connection among our members.

When you attend in person, you're doing more than earning CE or enjoying dinner. You're investing in your professional network. You're mentoring

younger dentists and reconnecting with peers. You're reinforcing the collective voice that protects and advances our profession locally and statewide.

There's a spirit that emerges when we gather that simply doesn't translate through a screen.

Rewarding the Effort

If you make the effort to attend, it should feel worthwhile. Better food. Thoughtful prizes. Themed surprises. Meaningful networking. A room full of colleagues who understand the unique challenges and rewards of dentistry.

We're building meetings that feel less like an obligation and more like a place where you can step away from the operatory, reconnect with your professional community, and maybe even leave with a plush horse or a dinner reservation in hand.

We hope you'll join us. Come for the CE. Stay for the camaraderie. Leave reminded of why being part of SCCDS, and showing up in person, matters. 🇺🇸



Dr. Monica Wu (L) and Dr. Sona Khinvasara, our February Prize Drawing winner!



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SCCDS Classified Ads Are Back!

We're pleased to announce that the SCCDS Classified Ads section is live again on our website—making it easier for members to buy, sell, and share opportunities within our local dental community. We're thrilled to offer this as another free benefit to our members, and we hope you find the new classifieds section simple, useful, and easy to navigate.

Members can post or browse listings for:

- Dental practices for sale or lease
- Equipment, supplies, and office furniture
- Office space and practice partnerships
- Professional services and announcements

Classified Ads Rules

To keep the system fair and useful for everyone, the following guidelines apply:

- Members only – Classified ads are available exclusively to current SCCDS members.
- Free for 60 days – Each ad runs at no cost for up to 60 days.
- No job or help-wanted postings – Employment-related ads are not permitted in the classifieds section.
- One active ad per member – Members may have only one classified ad posted at a time.



Looking to Post a Job or Find Staff?

For job openings or help-wanted ads, please use the SCCDS Career Center: careers.sccds.org

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In Memoriam



Burton E. Coleman, DDS
Orthodontist

6/28/1928 to 9/12/2024

Burton Eugene Coleman, age 96. Burt was born in Carbondale IL and moved to San Leandro, CA where he graduated high school. He served two years in the

Army and upon discharge used the G.I. Bill to obtain his undergraduate degree at UC Berkeley and graduate degree at UC San Francisco; completing his Doctor of Dental Surgery, specializing in Orthodontics. He joined the faculty at UCSF Dental School as an Associate Clinical Professor in the department of Orthodontics where he taught for the next 15 years. Additional professional interests included working with cleft palate patients as part of a reconstruction team. From 1955-1995 he had a successful orthodontic practice in San Jose, CA, during which he was elected to the honorary Edward H. Angle Society. In 1996 Burt retired to Durango, CO where he provided voluntary orthodontic care on local reservations. He was active in the Durango Rotary chapter and the Universal Unitarian Church. He spent many years as a volunteer in a local equine therapeutic riding club, assisting disabled kids and adults. Burt was an avid outdoorsman enjoying hiking, camping, skiing, riding horses, as well as spending time with his extended family. Burt is survived by his five children, ten grandchildren and four great grandchildren.



Herbert Berquist, DMD
Oral Surgeon

Past President 1973 - 1974
8/27/1927 to 7/27/2022

Herbert Carl Berquist, 94, born in Crystal Falls, Michigan, and a 40-year resident of Saratoga, California, passed away peacefully on the morning of July 27, 2022, in Las Vegas, Nevada. Herb was born on August 27, 1927. Herbert was preceded in death by his wife Helen. He is survived by his three daughters, Angela (Michael) Betts, Camille (Nicholas) Grisanti, Suzanne (Thomas) Barbey and son Deken (Alicia) Smith, and eight grandchildren.



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UCLA 2024

WELCOME!
We're glad you're here!

Retired Members

After years of serving their community, these members have decided to retire. We'd like to recognize them for their enduring support of organized dentistry and their profession. Drs. Dittrich, Dressman, Hikido, and Rindge are all Life Members with SCCDS, CDA, and ADA. Dr. Dang served as our Past President in 2025 and was active in leadership and in various committees. We hope you all have a wonderful retirement!



Hieu Dang, DDS
General Dentist
Past President, 2025
Joined in 2001



Martin Hikido, DDS
General Dentist
Joined in 1991



Rudolph Dittrich, DDS
General Dentist
Joined in 1973



Mark Rindge, DDS
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Charles Dressman, DDS
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2025 RECAP & 2026 OUTLOOK



2025 was truly an incredible year to be a member of SCCDS. From the elegance and camaraderie of our Annual Gala to the innovation and energy of the Bay Area Dental Expo, this year was filled with opportunities to connect, grow, and celebrate our profession together. Families and colleagues gathered under the sun at our Summer Picnic, and we closed out the year in festive style at our Holiday Party. Each event brought a familiar but unique blend of learning, food, and fun. Whether you joined us for continuing education, meaningful networking, or simply to enjoy time with friends and peers, 2025 showcased the very best of our organized dental community. We invite you to relive the memories and see the smiles in the pictorial on the following pages.

ANOTHER AM



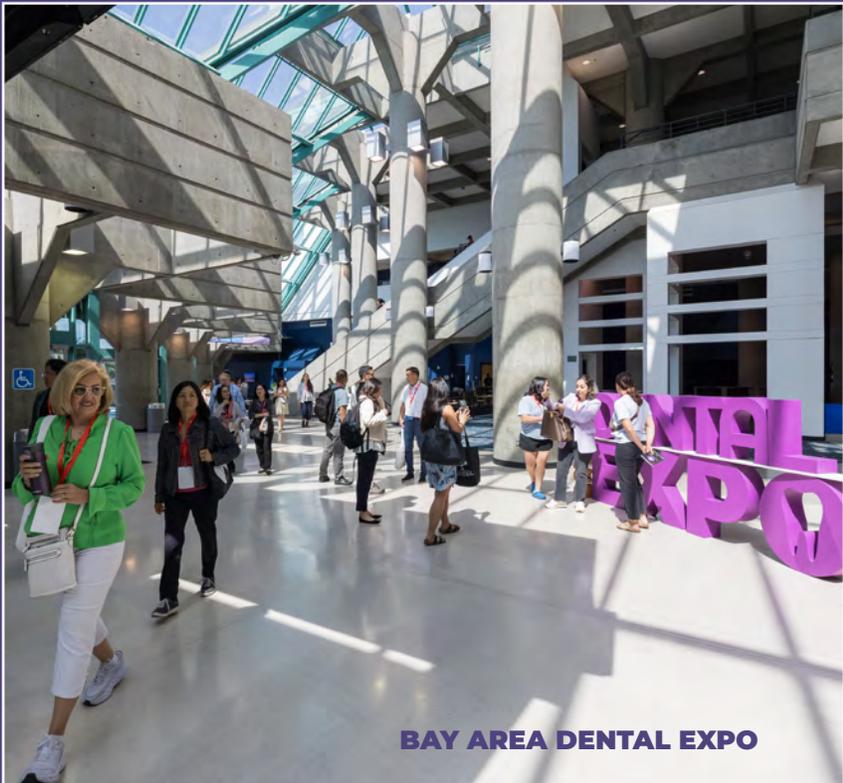
ANNUAL GALA & AWARDS



SCCDS SUMMER PICNIC



AMAZING YEAR!



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CDA ADVOCACY DAY



ORAL HEALTH FOR SENIORS



COMMUNITY HEALTH FAIR



CDA HOUSE OF DELEGATES PARTY



MIXOLOGY FOR MOMS



SCCDS HOLIDAY PARTY

Your Society. Your Profession. Your Future- SCCDS at Work

by Monica Wu, DDS
President, Santa
Clara County Dental
Society



Get to know me!



As I step into my role as President of the Santa Clara County Dental Society, I do so with profound gratitude and a deep sense of purpose. Our January Presidential Gala was more than a celebration of leadership transition. It was a celebration of our renewed commitment to the well-being, growth, and future of our profession and our community.

That evening, we proudly installed the 2026 Board of Directors, marking the beginning of a new chapter rooted in service, accountability, and forward-thinking governance. This leadership team is aligned with a clear priority: delivering meaningful value to our members while positioning SCCDS for long-term impact and relevance.



Your SCCDS 2026 Board of Directors (L-R) Drs. Kayhan Mashouf, Jennifer Yau, Monica Wu, Mamta Desai, Kay Rha, Robert Shorey, Nick Nguyen, Tim Verceles, and Hieu Dang. Not pictured: Drs. Troy Follmar, Victoria Furman, and Scott Morgan.

In my role as President, I am committed to guiding with care and vision. SCCDS will listen with intention, lead with integrity, and evolve continuously to support your professional success and empower you to provide exceptional care to every patient. Together, we will build a thriving, connected dental community that rises to meet the challenges of today and tomorrow.

Four Pillars Guiding 2026

This year begins with intention and renewed energy. At the heart of this presidency are four guiding pillars: Tradition, Transformation, Togetherness, and Transparency.

Tradition: Honoring Our Foundation

SCCDS has a proud legacy of supporting dentists through education, advocacy, and connection. We will continue the traditions that have served our members for decades, offering high-quality General Membership Meetings, relevant continuing education, community service opportunities and meaningful social events that strengthen professional relationships.

Our commitment remains clear: to focus on the needs of our members and our community. Tradition anchors us. It reminds us of who we are and why we exist. Tradition anchors us. It reminds us of who we are and why we exist. But tradition is not passive. It is something we actively steward together. Your participation keeps it alive. When you attend, engage, and invite colleagues, you strengthen the very foundation of our Society.

Transformation: Elevating the Member Experience

While we honor our traditions, we must also evolve them. Transformation means elevating the member experience, modernizing how we deliver value, and innovating in ways that make your membership more impactful.

In 2026, SCCDS is expanding opportunities that directly support your growth and success. Most notably, we are offering five complimentary Continuing Education courses to members this year as a practical investment in members' lifelong

learning, compliance, and clinical excellence.

2026 Complimentary CE courses

- Workplace Violence Prevention
- Harassment Prevention
- HIPAA Compliance
- Opioid Training
- CalOSHA Compliance

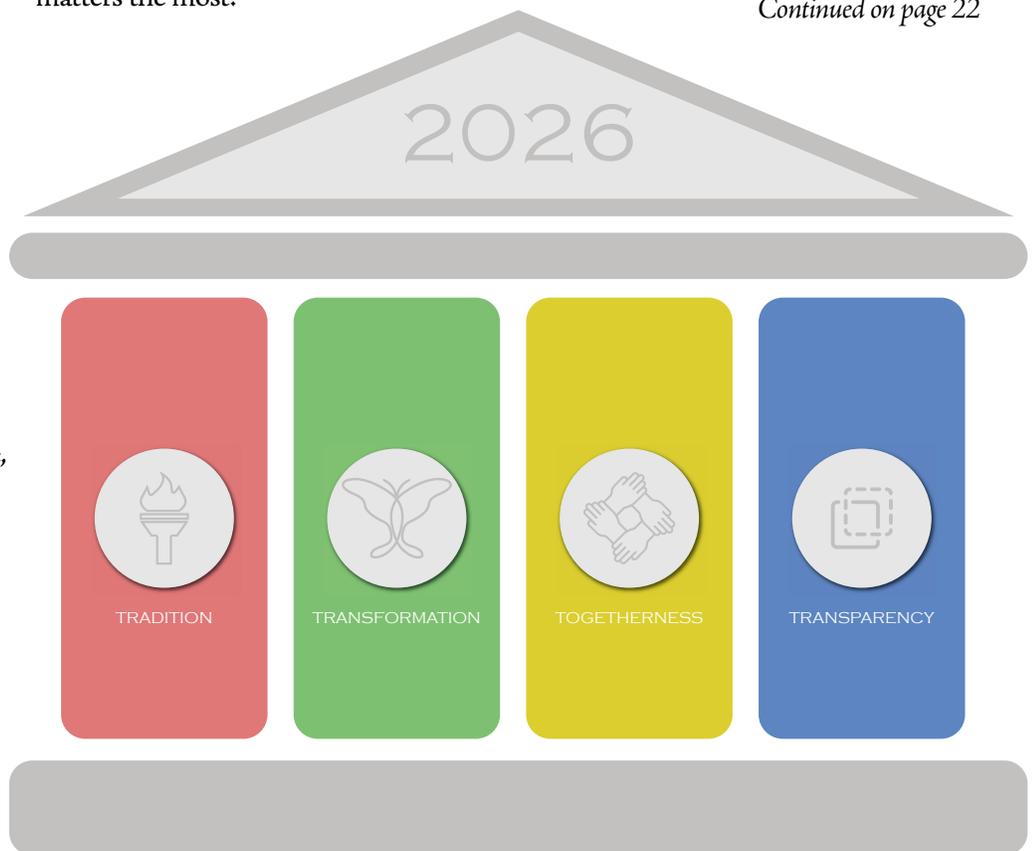
These programs are designed to save you time, reduce administrative stress, and strengthen your practice. This is transformation in action: delivering practical solutions and real value in your daily professional life, where it matters the most.

Togetherness: Rebuilding Connection

Nearly five years after COVID-19 reshaped our world, many professional communities are still rebuilding their sense of connection. Dentistry is no exception. Now is the time to restore belonging, strengthen relationships, and foster collective momentum.

SCCDS is recommitting to creating spaces where members can reconnect, collaborate, and support one another. We are maximizing the use of our headquarters to encourage greater engagement and accessibility. A Building Task Force will oversee upgrades to our SCCDS Headquarters

Continued on page 22



Togetherness and Transparency icons courtesy of Vecteezy.com

to improve functionality, expand usability, and create a more welcoming environment for gatherings and collaboration.

Besides multiple social and networking opportunities each year, we are also elevating the Bay Area Dental Expo, our premier, two-day Northern California conference held at the Santa Clara Convention Center this August. Created and produced by SCCDS, this expanding event is more than education. It is a powerful opportunity to energize your team and connect with colleagues who share your commitment to innovation. Bring a colleague. Bring your team. Be part of the energy that moves our profession forward. Togetherness means building energy and excitement around the future of our profession.

Transparency: Leadership and Trust

Transparency is foundational to trust. As leaders, we are committed to openly

sharing information, clarifying decision-making processes, and communicating organizational goals. Transparency fosters accountability. It encourages collaboration. It ensures alignment.

Transparency is not symbolic. It is *operational*. It thrives when members engage. If you are interested in leadership development, committee service, or governance participation, now is the time. We are building a strong leadership pipeline and welcome emerging voices at the table.

These four pillars (Tradition, Transformation, Togetherness, and Transparency) reflect both who we have been as an organization and who we are becoming. They honor the legacy of dentistry while positioning SCCDS to lead boldly into the future.

Leadership Alignment in Action

Under our Transparency pillar, we launched a series of leadership initiative

sessions designed to strengthen alignment and effectiveness across the organization.

Our January SCCDS Leadership Summit brought together Board members, leaders from the Santa Clara County Dental Foundation, and committee representatives for a focused workshop on leadership development. Through structured reflection and collaborative discussion, participants identified strengths, refined leadership styles, and built stronger cohesion. The result: greater alignment and renewed momentum for the year ahead.

In February, we continued this work with the SCCDS Leadership Strategy Forum, formally installing committee chairs and vice chairs under Board oversight. This session emphasized strategic direction and accountability, ensuring that every committee initiative aligns with SCCDS's mission, vision, and long-term strategy plan. Just as importantly, it reinforced that the Board

SCCDS COMMITTEES

Our committees are full of members like you who volunteer their time and energy to make things happen!



Communications



Community Service



Continuing Education



Foundation



Legislative/PAC



Membership

and committees operate as one unified leadership body instead of separate entities working in isolation.

This leadership series will culminate in September with our SCCDS Action & Impact Leadership Review. Leaders will reconvene to report measurable outcomes, assess progress, and reinforce shared responsibility. Transparency is not a concept; it is a practice.

Strengthening Our Purpose

Everything we do is grounded in purpose. That purpose is defined and guided by our mission and vision statements.

Our Mission: The mission of the Santa Clara County Dental Society is to assist our member dentists with their practice needs and to improve the oral health of our community.

Our Vision: The vision of the Santa Clara County Dental Society is to be the leader in providing innovative, valuable services to our dentist members and in working to improve the oral health of the community we serve.

These are not just statements. They are commitments. They guide how we design programs, advocate for our profession, and engage with our members and community partners.

Strategic Priorities: 2026–2028

To ensure SCCDS remains strong, relevant, and sustainable, the Board has adopted five strategic goals for implementation through 2028:

Goal 1: Data-Driven Excellence

- Build a comprehensive system to track and improve SCCDS

- programs
- Set 2026 baseline metrics for attendance, engagement, and satisfaction.
- Launch a digital dashboard by mid-2026 to monitor key performance indicators (KPIs).
- Boost average event attendance by 10% by 2027.
- Maintain a 90% satisfaction rating for CE programs.
- Review data quarterly to refine programming and maximize Return on Investment.

We measure, learn, and improve intentionally with no guesswork.

Goal 2: Insurance Reform Leadership

- Create a Bay Area Dental Insurance Reform Task Force by 2026.
- Define roles and form the task force by June 2026.
- Collaborate quarterly with at least five Bay Area dental organizations.
- Host two annual member town halls to improve insurance knowledge and advocacy.
- Collect and analyze real-world insurance challenges from members.
- Submit a formal policy report to California Dental Association and American Dental Association by December 2027.

From conversation to action, SCCDS leads in regional advocacy. If you want to see real change in the current insurance system, we encourage you to join the task force and be part of the movement. Connect at info@sccds.org.

Goal 3: Financial Strength & Sustainability

- Grow non-dues revenue by 20% by 2028 for long-term stability.
- Launch three new revenue programs by 2026.
- Increase net event profitability by 5% annually.
- Expand corporate sponsorships and partnerships by 25%.
- Produce quarterly reports to track revenue diversification starting in 2026.

Financial strength allows us to innovate, invest in members, and stay resilient.

Goal 4: Membership Growth & Engagement

- Increase and retain membership by 5% by 2028.
- Raise overall program participation by 10%.
- Boost participation from dentists with under 10 years of practice by 10%.
- Partner with three dental schools and host at least two student events annually.
- Conduct annual member surveys

Continued on page 24

FUN FACT:
 SCCDS puts on
100+
EVENTS
 annually for our
 members!

What are you waiting for?
 Sign up now!



to guide programming and retention strategies.

We'll focus on growth and meaningful engagement across all career stages.

Goal 5: Leadership & Governance Excellence

- Strengthen leadership through accountability, development, and succession planning.
- Conduct annual board self-assessments and track 100% accountability.
- Require annual committee performance reports starting in 2026.
- Launch a Board Leadership Development Program by 2027 to mentor at least five emerging leaders yearly.
- Approve and document a formal succession plan by December 2027.

These five Strategic Goals reflect proactive leadership, fiscal responsibility, and responsiveness to the evolving needs of today's dental professionals. Together, they form a plan that ensures continuity, transparency, and long-term organizational health.

Commitment to Community

SCCDS will continue to strengthen partnerships throughout the Bay Area, including our collaboration with the Santa Clara County Dental Foundation, to expand access to care and advance outreach initiatives that improve oral health outcomes.

Our impact extends far beyond the walls of our individual practices. Every day, we have the skills to relieve pain, restore confidence, and change the trajectory of someone's health.

Sometimes, that change comes in a single visit. For many in our community, access to dental care is not guaranteed. A child missing school because of untreated decay. A senior quietly living with chronic oral pain. A veteran who has not seen a dentist in years. These are not statistics. They are our neighbors.

As dentists, we are uniquely positioned to make a difference in ways few others can. Giving even a few hours of your time can restore not only oral health, but dignity and hope. When we serve together, we demonstrate the true power and heart of our profession.

If you feel called to contribute, whether through outreach events, Foundation programs, screenings, or pro bono opportunities, we invite you to step forward. Your time, your expertise, and your compassion matter deeply.

To get involved, please reach out to info@scdds.org. Together, we can extend beyond our practices leave a

lasting impact on the community we are privileged to serve.

Commitment to You

On behalf of our Board and leadership team: we are here for you. Dentistry is very demanding. That's why SCCDS is committed to being a trusted source of support, connection, advocacy, and practical resources. Our goal is not only to support your clinical excellence, but also the sustainability and fulfillment of your professional life.

If you ever need anything professionally, the SCCDS staff are here to help. Unsure about your member benefits or want more benefits? Reach out to info@scdds.org. We're happy to guide you.

This year is about more than programs. It is about people, purpose and progress. It is an honor to serve as your President. I look forward to working alongside each of you as we build a strong, connected, and thriving dental community together. 🇺🇸



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Membership Benefit	Estimated Annual Value
Zero dues for retirees	\$640
Bay Area Dental Expo	\$389
5 Free CE Courses*	\$500*
General Membership Meetings (Networking & Education)	\$675
Practice Management Events	\$100-\$300
Full-Day Symposiums	\$300-800
Cutting Edge Email & Biannual Print Newsletter	\$75
Patient & Professional Referrals	\$500-\$5000+
Staff Support for Practice & Compliance Questions	\$600-\$3000+
Time Savings from Expert Support	\$1500-\$5000+
Avoiding Compliance Fines & Legal Issues	Potentially Thousands
Volunteer Opportunities (Community Visibility)	Priceless
Committees (Leadership & Advocacy Opportunities)	Priceless

TOTAL ESTIMATED VALUE: \$4,000-\$15,000+ PER YEAR

*Workplace Violence Prevention, Harassment Prevention, HIPAA, Opioid Training, CalOSHA Compliance

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2026 CALENDAR OF EVENTS

CE
 SOCIAL
 FREE MEMBER BENEFIT



JAN	<div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">11</div> Leadership Summit <div style="background-color: #f4a460; color: white; padding: 2px; display: inline-block; margin-top: 5px; margin-left: 15px;">25</div> SCCDS Annual Gala
FEB	<div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">12</div> GMM <div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-top: 5px; margin-left: 15px;">22</div> All Committee Meeting
MAR	<div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">1</div> CDA Now+ Next @ TopGolf <div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-top: 5px; margin-left: 15px;">12</div> GMM <div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-top: 5px; margin-left: 15px;">21</div> Shred Party
APR	<div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">9</div> GMM <div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-top: 5px; margin-left: 15px;">26</div> Play & Learn Committee Mixer
MAY	<div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">14</div> GMM
JUN	<div style="background-color: #f4a460; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">14</div> SCCDS Annual Summer Picnic
JUL	<div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">25</div> Shred Party
AUG	<div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">21, 22</div> Bay Area Dental Expo
SEP	<div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">10</div> GMM <div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-top: 5px; margin-left: 15px;">27</div> New Member Welcome Dinner
OCT	<div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">8</div> GMM <div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-top: 5px; margin-left: 15px;">17</div> Shred Party
NOV	<div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">2 - 5</div> Prosperity Symposium Week <div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-top: 5px; margin-left: 15px;">12</div> GMM <div style="background-color: #28a745; color: white; padding: 2px; display: inline-block; margin-top: 5px; margin-left: 15px;">18</div> Hazardous Waste Disposal
DEC	<div style="background-color: #f4a460; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">3</div> SCCDS Holiday Party

2026 Compliance Courses

8 hr. Infection Control, DPA, OSHA

Jan 10	Feb 21	Mar 14	Apr 18
Apr 18	Jun 13	Aug 8	Sep 12
Oct 10	Nov 14	Dec 12	

Annual Mandatory CalOSHA Training
 Apr 21 Oct 13

Annual Mandatory HIPAA Training
 Mar 24 Nov 17

Annual Mandatory Workplace Violence Prevention & Active Shooter Training
 Mar 3 Oct 6

CPR

Jan 9, 12, 17, 26	Feb 6, 7, 9, 23	Mar 6, 7, 16, 23
Apr 3, 9, 13, 20	May 1, 2, 11, 18	Jun 5, 6, 15, 22
Jul 10, 11, 13, 18, 27	Aug 1, 7, 17, 24	Sep 4, 5, 14, 21
Oct 2, 3, 12, 19	Nov 6, 9, 16, 21	Dec 4, 5, 14, 21

Infection Control, DPA, OSHA for License Renewal

Feb 19	May 29	Aug 28	Oct 23
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Mandatory Harassment Prevention Training
 Feb 19 May 21* Aug 20* Nov 19
**Employees only*

Mandatory Opioid Training for License Renewal
 Mar 19 Oct 15

Events are subject to change and/or cancellation without notice. In the event of a change or cancellation, SCCDS will attempt to notify registered attendees and provide reasonable alternatives and/or refunds if necessary.

Visit [SCCDS.ORG](https://www.sccds.org) to register!

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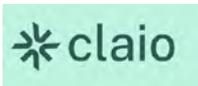
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Ultralight Optics
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SCCDS Staff and Leadership extend our deepest gratitude to our 2026 Sponsors. Thank you!

SCCDS 2025 Financial Summary

by Katie Lam,
Deputy Director
of Finance



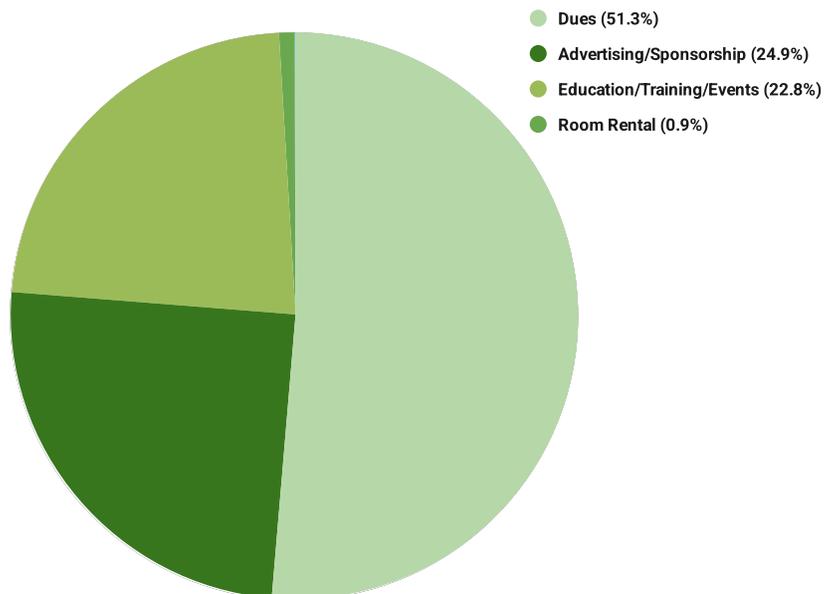
SCCDS ended 2025 in a stronger financial position than expected. While some expenses exceeded budget, overall income surpassed projections, allowing the Society to close the year with a net surplus instead of a loss. This positive outcome reflects strong participation in education and events, solid sponsor support, and careful financial management.



Income: Exceeding Expectations

Total income for 2025 was \$1.46 million, compared to a \$1.36 million budget (107%).

- Membership dues: \$745,097 received (98.5% of budget), representing a \$97,000 increase over 2024, even though revenue came in slightly under target.
- Advertising and sponsorship: \$363,000 (102% of budget), up \$74,000 year over year.
- Education, training, and event income: \$332,000 (142% of budget), reflecting strong demand and engagement.
- Additional income:
 - \$12,000 in ADA and CDA/TDIC grants
 - \$4,000 in credit card rewards
 - Investment account growth of \$22,000



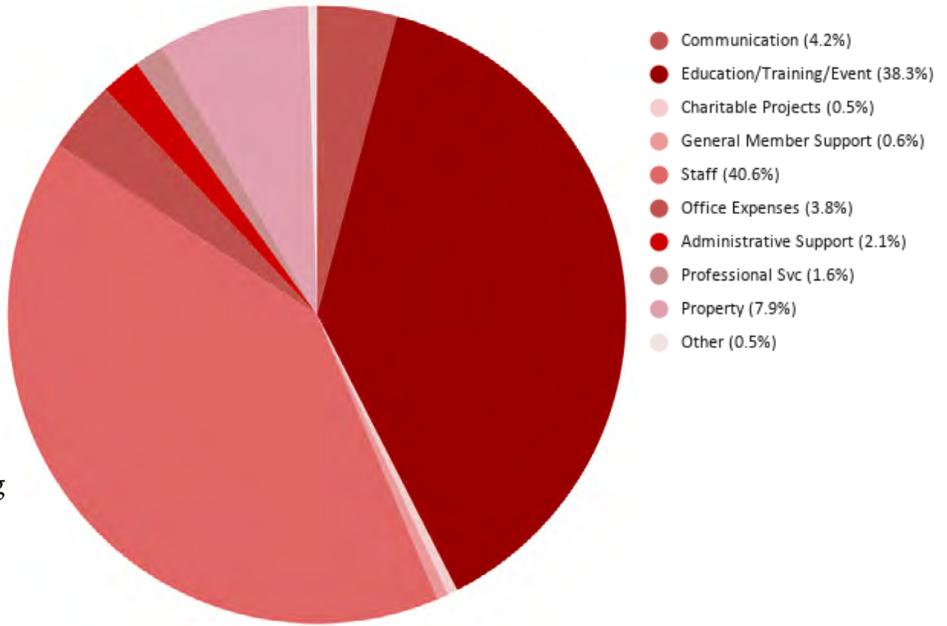
✘ Expenses: Targeted Investments and One-Time Costs

Total expenses were \$1.43 million, compared to a \$1.37 million budget (104%). Several higher costs were tied to revenue-generating programs or one-time investments: Expo: \$341,000 actual vs \$295,000 budget; future budgets have been adjusted to better reflect true costs.

Education, training, and events: \$43,000 over budget due to increased participation.

Infection Control class: \$79,700 total, exceeding budget by \$30,000.

Website overhaul: \$40,000, the largest single expense of the year; the 2026 budget has been reduced to \$26,000.



Cost Savings and Offsets

Some areas came in under budget and helped offset increases:

- Magazine: \$3,700 under budget and profitable, with \$19,000 in ad sales.
- Social events: \$26,000 under budget, supported by ADA and CDA/TDIC grants.
- Administrative support: \$15,000 under budget, including savings from hosting strategic planning locally.
- Other operational overages included staff bonuses, office expenses, credit card fees, IT support, and higher utility costs related to an external solar panel issue.

Year-End Results

- Net operating surplus: \$34,637
- Investment account ending balance: \$731,000, up \$79,000 for the year
- Unrealized investment gains: \$58,875



The 2025 budget originally planned for a small loss. Instead, SCCDS finished the year with nearly \$40,000 in net revenue, strengthening the Society’s ability to invest in member programs and plan confidently for the future. 🇺🇸





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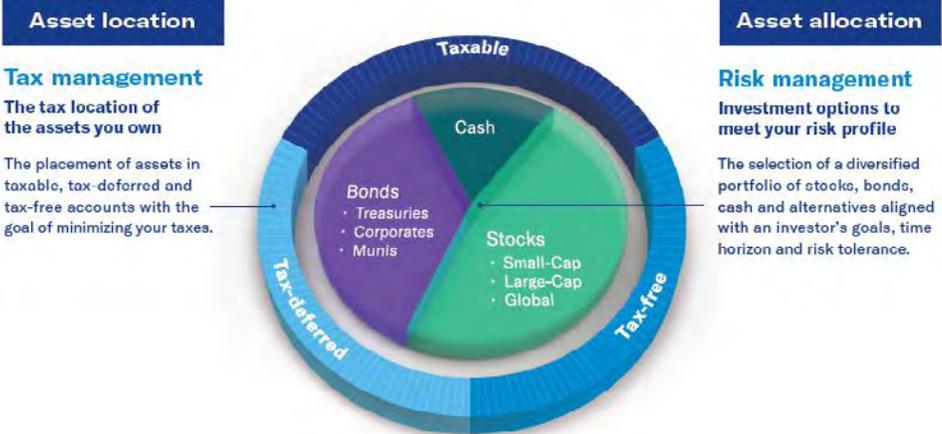
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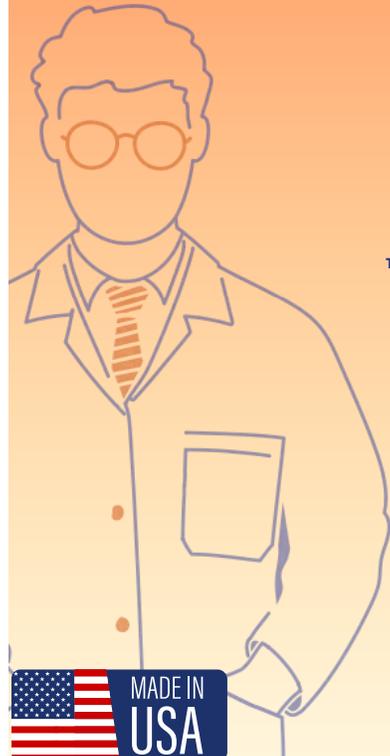
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Where Medicine Meets the Mountains: A Dental Mission in Bhutan

by Logan Lehnert,
Student at Colby
College with assistance
by Rich Kao, DDS, PhD



How does one define dental health in a society striving to become the Happiest Country in the World? This question framed the work of the IEP-TD during a recent humanitarian mission to Bhutan. Our dental team joined fellow IEP volunteers who specialize in lower extremity care, working together to assess and improve health outcomes for underserved populations. On this mission, IEP-TD focused on oral health, and its role within a healthcare system guided by a philosophy unlike any other.

Dentistry in the Context of Happiness

Bhutan has redefined progress through the concept of Gross National Happiness. Rather than measuring success through economic output alone, the Bhutanese government evaluates national well-being using four pillars: sustainable development, cultural preservation, environmental conservation, and good governance. This approach fosters a life rooted in nature, Buddhist traditions, strong community ties, and intentional simplicity. Healthcare is provided free of charge to all citizens, reflecting the country's commitment to collective well-being. However, limited financial resources restrict access to specialized dental, and medical care.



Figure 1. Logan Lehnert Assisting Dr. Rich Kao.



Figure 2. Bhutanese Dentists performing surgery under the supervision of Dr. Kao.

The IEP Mission and Dental Team

At the invitation of the Bhutanese government, and Princess Kesang Wangchuck, IEP was asked to assist in assessing, and improving health services. While IEP is best known for treating complex lower extremity deformities, this mission included a dental team consisting of Dr. Rich Kao, DDS, a periodontist with extensive international experience, and myself, Logan Lehnert, a predoctoral student from Colby College, to address oral, and periodontal health needs. I have participated in seven prior IEP missions, this experience marked my second mission focused directly on dentistry, and aligned closely with my future professional goals.

Dental Care in Bhutan

All of Bhutan's dentistry is provided at government hospitals by general dentists with few specialists in

prosthodontics, endodontics, oral surgery, orthodontics. Notable missing elements are periodontists, and dental implant surgical expertise. All dentists are trained abroad after four years of undergrad studies in Bhutan before going to countries such as India, China, Malaysia, and the Philippines

After dental school, they return home to serve in a public healthcare system with dental services provided free of charge; with the exception of cosmetic procedures, and orthodontics. Despite these constraints, Bhutan has succeeded in delivering basic dental care nationwide.

Advancing Care Through Training

Our mission objective was to improve access to advanced periodontal surgical care and emphasized the need for preventive oral hygiene support. The absence of dental hygienists places a heavy burden on dentists, who

must manage both treatment, and prevention. Bhutan currently does not have a practicing periodontist, though its first is completing specialty training in the Philippines.

Our IEP dental team provided a group of seven dentists, which we have named Team Bhutan, with didactic lectures, demonstration surgeries, and supervised their surgical training in advanced periodontal surgical procedures that focused on pocket reduction (modified Widman, flap curettage, and flap osseous surgery), mucogingival surgery (free gingival and connective tissue grafts), and crown lengthening (functional and esthetic).

While providing lectures, and demo surgery is important, our objective was to make Team Bhutan comfortable with doing surgical procedures. Their enthusiasm, and dedication certainly helped them achieve those surgical objectives. *Continued on page 34*

Sustaining Progress Through Collaboration

IEP Dental will continue to work closely with Team Bhutan, and Bhutanese dentists to strengthen skills in periodontal triage, supportive, and advanced procedures. Plans are underway to further strengthen, and support Team Bhutan by sending a digital periodontal charting package, an intraoral camera, and small surgical instruments to support Team Bhutan's ability to continue to develop their surgical skills. The collaborative efforts for Zoom treatment planning, and continue to work collaboratively with the Bhutan Ministry of Health, and the University to develop policies for implementing an effective dental hygiene, and auxiliary program. Dentistry, Dignity, and Gross National Happiness

This experience by IEP Dental, and Team Bhutan reinforced a vital truth: high quality dentistry is defined not by technology alone, but by adaptability, humility, and commitment to patients. In Bhutan, oral health is inseparable from dignity, well-being, and Gross National Happiness itself.

Acknowledgement

A special thank you to Mid-Peninsula Dental Society for supporting IEP-TD with donations and supplies. 🇺🇸



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Why Dentists Benefit from Coordinated Financial, Tax, and Practice Planning

by Sheri Pan, CEO & Founder @ Pantheon Wealth Planning | CFP®, Masters in Taxation



If you're a dentist, you're used to juggling a lot. You're running a practice, caring for patients, managing staff, making big equipment decisions, and still trying to think about your own financial future. Most days, it feels like there's always one more thing pulling at your attention.

What I see far too often is that the financial side of a dentist's life gets handled in pieces. Taxes here. Investments there. Practice decisions somewhere else. Everyone is working hard — but not always together. And that's where things can quietly start to feel more complicated than they need to be.

The “Three-Legged Stool” Most Dentists Are Standing On

I like to think of long-term planning like a three-legged stool. For it to be stable, all three legs need to be working together:

- Your personal financial planning
- Your tax and legal planning
- Your practice planning

When one of those legs is ignored — or handled in isolation — things start to wobble. Saving aggressively without understanding tax impact. Growing a practice without clarity on how it supports retirement. Making tax decisions that don't align with long-term goals. Any one of those on its own isn't wrong. It's just incomplete.

The Modern Dentist's Financial 3-Legged Stool

Retirement stability has shifted from pensions to intentionally aligning practice value, personal savings, and tax strategy.



Designate a “Central Hub” Coordinator: Assign one professional to manage the communication between your CPA, Attorney, and Advisor to save time and ensure consistency.

When You're Stuck Playing Middleman

One of the most common frustrations dentists share with me is this: “I feel like I'm the messenger between my CPA, my attorney, and my

financial advisor.” That’s exhausting — and it’s not where your time or energy should be going. When your advisors aren’t aligned, you end up translating conversations, forwarding emails, and trying to connect dots that shouldn’t be yours to connect. Even worse, important opportunities can get missed simply because no one is looking at the full picture at the same time.

Doing “Good Things” Isn’t Always the Same as Doing the Right Things

Many dentists are doing a lot of things right. Contributing to retirement accounts. Reinvesting in the practice. Staying disciplined. But without a coordinated plan, it can start to feel like throwing darts at a dartboard and hoping they land where you want.

A coordinated approach brings clarity. It answers questions like:

- How much do I actually need to accumulate to create income later?
- How does the value of my practice fit into that plan?

- When should I be making certain tax or investment decisions — and why?

That clarity is incredibly powerful. It turns effort into intention.

What Changes When Everything Is Aligned

When financial, tax, and practice planning are coordinated, something really important happens: complexity gives way to confidence. Decisions start supporting each other instead of competing with each other. Timing becomes intentional. Conversations become simpler. And you’re no longer carrying the burden of making everything fit together on your own. You move from reacting... to planning with purpose.

A Clear Path Forward

Planning for retirement and a future beyond your practice doesn’t have to feel overwhelming. Yes, there are a lot of moving parts — and yes, the

responsibility ultimately rests with you. But you don’t have to navigate it alone, and you don’t have to do it in pieces.

When your advisors are working together — your financial life becomes easier to understand, easier to manage, and far more aligned with the life you’re working so hard to build.

And that’s the goal: not just doing more, but creating a clear, connected strategy that supports both your practice and your life.

This information was created to provide accurate and reliable information on the subjects covered but should not be regarded as a complete analysis of these subjects. It is not intended to provide specific legal, tax or other professional advice. The services of an appropriate professional should be sought regarding your individual situation.

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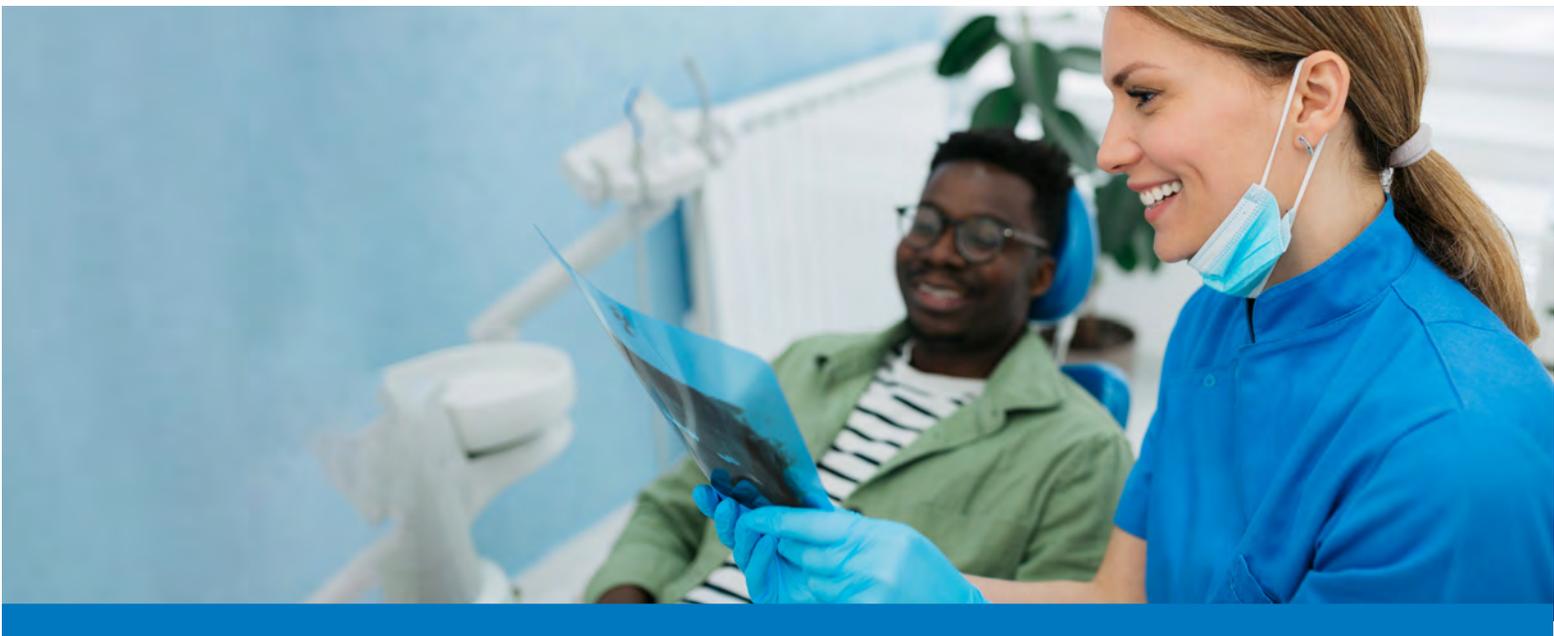


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¹Gordan VV, Mondragon E, Watson RE, et al. A clinical evaluation of a self-etching primer and a giomer restorative material: Results at eight years. JADA. 2007;138(5):621-627. ²Mjör IA, Moorhead JE, Dahl JE. Reasons for replacement of restorations in permanent teeth in general dental practice. Int Dent J. 2000 Dec;50(6):361-6. doi: 10.1111/j.1875-595x.2000.tb00569.x. PMID: 11197194. ³Asahi University School of Dentistry. *Beautiful II, Beautiful Flow Plus X, or Beautiful Kids SA only. One product sample per office. While supplies last.



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2026 Retirement Plan Changes Every California Dentist Should Understand

by Laura Phillips, E.A.,
CEO of The Phillips
Group



As an Enrolled Agent, I spend a lot of time helping dentists think beyond this year's return. Retirement planning used to be something we discussed during calm planning meetings. In 2026, it's different. It's not just an investment conversation anymore. It's a compliance issue, a payroll issue, and in some cases, a penalty issue.

Between SECURE Act 2.0 and California's CalSavers mandate, retirement planning has shifted from theory to execution. For Bay Area dentists operating in one of the most regulated and expensive markets in the country, overlooking the details can become costly very quickly.

Let's start with CalSavers, because this is where I see the most confusion. If you have even one W-2 employee in California and you do not sponsor a retirement plan, you are generally required to register with CalSavers. If you do sponsor a retirement plan, you need to submit a valid exemption through the employer portal. As of December 31, 2025, that requirement extends even to practices with just one to four employees. That means a small dentist-owned office with a single assistant, a hygiene-focused micro-practice, or a startup still ramping up may now fall under the mandate.

Many Bay Area dentists assume they are too small to worry about it, or that their payroll company is handling it automatically. Some believe that using independent contractors (1099), rather than employees (W-2) keeps them outside the rules. CalSavers identifies employers using state employment reporting data, and if you are flagged and do not respond, penalties can apply. After notice, the penalty can be \$250 per eligible employee, followed by an additional \$500 per eligible employee if noncompliance continues. In a region where labor costs are already high, this is an avoidable expense.

Even if you sponsor a 401(k), SEP, or SIMPLE IRA, you are still expected to report your exemption in the portal. Taking a few minutes now to confirm your status can prevent unnecessary notices or penalties later.

For owner-only S-corporation practices, there may be an exemption from CalSavers if there are no employees other than the owner, or only the owner and spouse. However, this should be verified formally through the employer portal rather than assumed. Documentation is essential.

Now let's talk about SECURE Act 2.0, because this is where retirement strategy intersects directly with tax planning. Required minimum distributions now begin at age 73, increasing to 75 in 2033. While that sounds straightforward, the timing decision can have unintended consequences. If you delay your first RMD until April of the following year, you may end up taking two RMDs in the same tax year. For a Bay Area dentist who owns an S corporation, earns strong investment income,

and may already be near Medicare premium surcharge thresholds, doubling up distributions can significantly increase federal taxes and Medicare costs. Retirement timing decisions now affect tax brackets, Medicare premiums, and overall cash flow. They should never be made in isolation.

I've seen dentists delay their first RMD thinking they were being tax-efficient, only to realize the following year that they triggered two large distributions at once. That pushed them into a higher tax bracket and increased their Medicare premiums. The rule itself seems simple enough, but the impact is not.

Another meaningful change is the elimination of lifetime required minimum distributions for Roth 401(k) and Roth 403(b) assets beginning in 2024. For high-income dentists who do not need retirement income immediately and who may be thinking about long term wealth transfer, Roth workplace accounts have become more attractive. Strategic Roth contributions or conversions may play a larger role in overall planning, particularly in a high-tax state like California.

Starting in 2025, individuals aged 60 through 63 can make enhanced catch-up contributions equal to the greater of \$10,000 or 150% of the standard catch-up amount, indexed for inflation. For practice owners in their early sixties who are planning to sell within the next several years, this creates an opportunity to accelerate retirement savings during peak earning years. However, these

contributions only work smoothly if plan documents are updated, and payroll systems are configured properly. Otherwise, administrative errors can undermine good planning.

For owners who anticipate selling their practice in the next five to seven years, these contribution windows and Roth strategies can materially affect how much of your sale proceeds ultimately stay in your pocket.

Mandatory automatic enrollment is another change that affects new plans. For plan years beginning after December 31, 2024, most newly established 401(k) and 403(b) plans must include automatic enrollment, typically starting between three and ten percent with automatic annual escalation. If you are launching a new practice in the Bay Area and considering a retirement plan for your team, you need to understand how automatic enrollment affects payroll processes and employee communication. You will want to coordinate closely with your third-party administrator and payroll provider before implementation.

Looking ahead, Roth catch-up contributions for certain high earners are scheduled to become mandatory beginning in 2027 under final regulations. Although that may feel distant, payroll systems and plan providers need time to prepare. Waiting until the last minute can create unnecessary disruption.

The practical takeaway for practice owners is straightforward. Confirm your CalSavers compliance or exemption status. Review your retirement plan

documents to ensure they reflect SECURE 2.0 updates. Verify that your payroll provider is prepared to handle catch-up and Roth requirements properly. If you are nearing RMD age, model the tax and Medicare implications before taking distributions. And if you are starting a new plan or adding complex features, involve experienced advisors early.

In the Bay Area, operating costs are high, regulatory scrutiny is increasing, and margins require careful management. Retirement planning is no longer just about saving more. It is about aligning compliance, payroll systems, tax strategy, and long-term exit planning so your practice supports your financial future instead of complicating it.

If your retirement plan has not been reviewed in the past couple of years, 2026 is the year to revisit it. The rules have changed and your strategy should reflect that. 🇺🇸



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