(216) 765-1199

COLLIER & ASSOCIATES

COLLIERADVISORS.COM

Brandon Collier

Lawyer, Dental Practice and Tax Expert, Keynote Speaker, and Author

"Brandon is a skilled speaker and trusted advisor, dedicated to making a difference in the lives of his clients. We highly recommend the guidance (he) offers and truly appreciate the great fun we have while learning."

-Terry L. Davidson, DDS, PA

Brandon Collier is a leading national dental attorney and consultant. He advises thousands of dentists on legal, tax, business, and investing strategies through his seminars and the Collier & Associates Doctors' Newsletter. For over 50 years, Collier & Associates has been aligned with the American dental profession. Renowned for his engaging and practical presentations, Brandon is an esteemed speaker at national, state, and local professional society meetings, regional study clubs, and seminars.

Book Brandon today!

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AAO Member American Association of Orthodontists

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Seminar and Lecture Topics

Customizable Topics Available Upon Request

PRACTICE TRANSITIONS

- The two tests for knowing when it's time to retire
- Finding a buyer
- Valuation of a dental or specialty practice
- Dividing compensation in group practices
- Avoiding practice transition blunders
- Using tax laws to save money when buying or selling a practice or taking/becoming a partner

INSURANCE

- When you need it and when you don't
- Life insurance: permanent vs. term
- Disability – long-term income replacement and short-term office overhead
- Long-term care – do you need it or not?
- Other important types – liability, fidelity bond insurance, employment practices, and cybersecurity

YOUNG DOCTOR TOPICS

- Intro to investing – stocks, bonds, and mutual funds
- Paying down debt
- The tax benefits of IRAs and retirement plans
- Practice management – boosting revenue, controlling overhead
- Insurance needs for the young doctor
- Practice transitions – employment contracts, appraisals, and sale/partnership agreements

TAXES

- Aggressive (but legal) practice deductions to consider: auto, travel, home office, family members on payroll, etc.
- Analyzing the best retirement plans + IRAs
- Evaluating tax-advantaged savings plans for a child or grandchild's education

PRACTICE MANAGEMENT

- The importance of periodic fee increases
- Risks of fee reductions or managed care plans
- Revenue-enhancing and cost-cutting tips
- Proper treatment of referring doctors
- Spotting and preventing embezzlement

LONG-TERM INVESTING FOR RETIREMENT

- Growing wealth with simple, long-term investing techniques
- Determining how much to save for financial security in retirement
- Analyzing stocks, bonds, and current investment opportunities
- Embracing stock market volatility

DISCOVER BRANDON COLLIER

Elevating Dental Practices Through Expert Guidance

Brandon Collier continues the legacy of Collier & Associates by combining the wisdom of decades in practice with contemporary insights to support doctors in navigating their profession and personal financial affairs. Through lectures, seminars, newsletters, and legal counsel, Brandon offers trusted guidance in critical areas such as practice transitions, practice management, taxes, estate and gift planning, insurance, and investing. As a skilled speaker, his lectures are infused with practical advice and humor, ensuring an enlightening experience for audiences.

EDUCATION

B.A. In History
University of Pennsylvania

Juris Doctor
Case Western Reserve University School of Law

LL.M in Taxation
New York University School of Law

"I always find he distills the ever-changing complexities of running a practice into concise and applicable directives that not only make my business more successful, but also give me peace of mind in my personal life as well."

-Dr. Katherine Hill

BOOK BRANDON TODAY!

Invite Brandon to speak at your next event and equip your audience with invaluable tools for achieving both professional and personal success.

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