

# WILLEFORD GROUP

## ***Rick Willeford, CPA/CFP, Managing Partner — Dental Wealth Advisors, LLC***

A fee-only CERTIFIED FINANCIAL PLANNER™, Rick has specialized in designing financial planning strategies for dentists for over 30 years. You can achieve your quality of life and income goals! For those just getting started — to those needing to “catch up” — Rick creates a plan & investment strategy tailored for you.



*Rick Willeford,  
CPA/CFP*



*Kate Willeford,  
CPA/CCPS*

## ***Kate Willeford, CPA, CCPS, Managing Partner — Dental Practice Advisors, CPA, PC***

Do you receive surprise tax bills or have no tax planning meetings during the year? The foundation for our profitability consulting is our “accounting” services. As dental CPAs, we help maximize tax deductions so you can keep more of your hard earned money and achieve the income you deserve.

## ***David M. Reznik, DDS, Managing Partner — Dental Transition Advisors, LLC***

Bringing on a partner? Buying into a practice? Selling an established practice? You'll value from our collaborative approach to transition your most important asset. Our extensive presence in the dental marketplace helps us determine the fair value of a practice and insures its value is realized in a win-win transaction. Our tax expertise allows us to structure the transaction to maximum mutual advantage.



*David M. Reznik, DDS*



*Jennifer McDonald*

## ***Jennifer McDonald, Managing Partner — Dental Management Advisors, LLC***

How are we different? #1 – Our focus is on providing personalized, practice management consulting services designed to meet your individual needs. We place special emphasis on excellent teamwork, quality clinical delivery, outstanding customer service, and sustainable management systems. Our goal is to assist you in discovering the potential of your practice – while enjoying dentistry.



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DENTAL PRACTICE ADVISORS

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***Securing Practice Health.  
Building Personal Wealth.***