



The Florida Academy of Dental Practice Administration

59TH

Annual Meeting

PONTE VEDRA LODGE & CLUB
March 28-30, 2019



Ponte Vedra Inn & Club



The Florida Academy of Dental Practice Administration

Vision Statement

The FADPA is the standard bearer for excellence in dentistry and the promotion of private practice.

Mission Statement

The mission of the FADPA is to achieve excellence in the delivery of quality dental care through the promotion of private practice, education, life management, and fellowship.



Dear Academy Members and Guests,

Welcome to the 59th meeting of the Florida Academy of Dental Practice Administration! I hope you will enjoy your time away from your office as we experience Northeast Florida including the beach and all the amenities available here at both the Ponta Vedra Lodge & Club as well as the Ponta Vedra Inn & Club. Our group will be taking up the majority of the rooms in the Lodge so we have the unique opportunity to interact within our educational programs, in the afternoons, and in the evenings throughout the property. Enjoy your time with long-standing friends but take advantage of the opportunity to meet other members and guests from around the state. The opportunity to interact with like-minded dentists while experiencing unique educational opportunities that we wouldn't find at a typical dental meeting is part of what makes this organization special.

This year, our program chair, Dr. Bill Layman, has arranged for two presentations: Asset Protection and the Pitfalls of Being Underinsured When Catastrophe Strikes, Peter Rivellini, Esq. and Negotiating the Jungles of Human Resources, Management and Compliance, Colleen Flynn, Esq.

While mornings will be spent in educational courses, our schedule also allows ample opportunity to spend time with family and friends in the afternoons and evenings. Our social activities began with a welcome reception on the Ocean Lawn on Thursday evening. Following the reception, I encourage you to join friends for dinner on your own. Friday afternoon we will be holding our annual golf tournament at the beautiful and challenging Lagoon Course located 1.7 miles north at the Ponta Vedra Inn and Club. Jim Outlaw has organized two tournaments for those participating on the links. Serious golfers who are members of the Academy can play stroke play for the Archie Meekins trophy while non-members, guests, and members who prefer a team event will play in teams of four in a best ball format. Saturday evening, we will wrap up the meeting with our annual dinner dance being held in the Trellis. During this celebration our new members will be honored, prizes will be awarded for golf, and our new officers installed. We are also proud to be celebrating and honoring our newest Fellow, Dr. Larry Clark, for his many years of contributions to the FADPA.

It is my honor to serve as the President of our Academy. I want to extend a heartfelt thank you to the Executive Council who have worked tirelessly to invigorate our members and subsequently, our Academy. Through their hard work, the Academy is in a strong position for growth as more and more dentists seek out like-minded colleagues with whom they can celebrate and commiserate about all the opportunities and challenges that being a private practitioner in dentistry presents.

Finally, a meeting like this weekend's does not occur without a team organizing each detail. I would like to extend special thanks to our Executive Director, Kelsey Bulnes who has worked tirelessly to make this meeting special for you. We are very lucky to have her working with our organization. If you get the opportunity, please take a moment to show your gratitude.

Thank you for attending the FADPA meeting this year. I know you will enjoy Ponta Vedra and spending time with new friends and old. Let's have a great meeting!

Sincerely,

A handwritten signature in black ink, appearing to read "James G. Wilson". The signature is fluid and cursive, written over a light blue horizontal line.

James G. Wilson, DMD
President 2017-2019

■ SCHEDULE OF EVENTS ■

Thursday, March 28, 2019

12:00 p.m. – 5:00 p.m. **Executive Council Meeting**
Conservatory

6:00 p.m. – 7:00 p.m. **Welcome Reception**
Ocean Lawn

Friday, March 29, 2019

7:30 a.m. – 11:30 a.m. **Registration**
Ocean Room Foyer

7:45 a.m. – 8:45 a.m. **Breakfast for New Members, Sponsors, Sponsor's
Guests, and Executive Council**
Conservatory

9:00 a.m. – 11:30 a.m. **Asset Protection and the Pitfalls of Being
Underinsured when Catastrophe Strikes,
Peter Rivellini, Esq.**
Ocean Room

12:00 p.m. – 5:30 p.m. **Golf at Lagoon Course**
Golfers: Lunch available for pick-up in the lobby.
Hotel shuttle available at no charge
(6 person max).

The evening is on your own.

■ SCHEDULE OF EVENTS ■

Saturday, March 30, 2019

- 7:30 a.m. – 11:30 a.m. **Registration**
Ocean Room Foyer
- 7:45 a.m. – 8:30 a.m. **District Caucus Breakfast** (*voting members only:
active, new, senior, fellow and founder*)
Palm Room
- 8:30 a.m. – 9:00 a.m. **General Assembly** (*voting members only:
active, new, senior, fellow and founder*)
Conservatory
- 9:00 a.m. – 11:30 a.m. **Negotiating the Jungles of Human Resources,
Management and Compliance,**
Colleen Flynn, Esq.
Ocean Room
- 2:00 p.m. – 4:00 p.m. **Mastermind Session**
Q & A with Colleen Flynn, Esq.
Ocean Room
- 6:30 p.m. – 11:00 p.m. **Reception and Dinner, Dance & Celebration**
Trellis (Awards, New Member, Officer and Fellow
Installation)

Sunday, March 31, 2019

- 8:00 a.m. – 12:00 p.m. **Executive Council Meeting**
Conservatory

Meeting handouts can be found at
www.fadpa.org/meeting-handouts

■ ABOUT THE SPEAKERS ■



Peter Rivellini, Esq.

Peter advises individuals and families with respect to estate planning, wealth preservation issues and business succession planning. He also represents businesses and entrepreneurs with respect to startup ventures, financing, and mergers and acquisitions. He further represents tax exempt organizations, foundations and charitable groups.

When most people hear the words “asset protection,” visions of offshore trusts and numbered Swiss bank accounts come to mind. While these techniques certainly are within the realm of asset protection for the ultra-wealthy, there are many techniques that are available to the middle-class that often are more powerful and (much) less expensive. The core of every asset protection plan starts with basics concepts. More often than not, these basic concepts can provide sufficient protection to give most people peace of mind.

The best asset protection plan is one that is combined with a comprehensive estate plan, regardless of the complexity or value of the assets owned by the client. Both types of plans are important and generally tie in together inextricably. While some advanced techniques and plans provide heightened protection, they come at a cost, both monetary and otherwise. Certain techniques are more complicated than others, not necessarily just in the creation, but in the ongoing maintenance and reporting. Other techniques require the client to give up unfettered control of the asset. It is often difficult to balance the protection that a client may seek with the complexity and release of control, both of which most clients dislike.

An experienced attorney will generally outline the spectrum of possibilities and explain the pros and cons of the various options. It is within this spectrum that most middle-class clients will find comfort that they too can be protected without the need of an offshore trust or a numbered Swiss bank account.

■ ABOUT THE SPEAKERS ■



Colleen Flynn, Esq

Colleen joined Johnson Pope after practicing for 5 years in Chicago. Colleen practices in the labor and employment group and the commercial litigation group. Colleen has experience representing businesses and individuals in all types of disputes. She also has successfully represented businesses and individuals in employment related matters including discrimination and harassment claims involving age, race, sex, religion, marital status, national origin, and disability under local, state and federal laws as well as claims under the Fair Labor Standards Act and both the state and federal whistle-blower statute.

Colleen counsels clients on employment policies including terminations, leave under the Family and Medical Leave Act, reasonable accommodations under the ADA and has drafted employee handbooks, employment contracts, non-compete agreements and severance agreements.

Colleen has extensive experience defending property owners in ADA access cases in federal court.

In this program we will discuss common issues facing practices with respect to complying with employment laws and managing human resources. Topics to be discussed will include, compliance with wage and hour laws, laws applicable to leave, accommodation and non-discrimination. We will also discuss best policies and procedures to include in your employee handbooks as well as proper records compliance and documentation to be contained in an employee's personnel file.

■ PAST PRESIDENTS ■

Dr. E. Monroe Farber	(ATL)	1960-62	Dr. Reuben R. Roach	(WC)	1990-91
Dr. Andrew A. Henry	(ATL)	1962-64	Dr. Joe R. Hughes	(NW)	1991-92
Dr. John E. Dalton	(ATL)	1964-65	Dr. Jon H. Baxter	(C)	1992-93
Dr. M. Lee Toothman	(ATL)	1965-66	Dr. Olin G. McKenzie	(EC)	1993-94
Dr. Peter E. Dawson	(WC)	1966-67	Dr. Malcolm Nalls	(WC)	1994-95
Dr. Thomas W. Schroeder	(C)	1967-68	Dr. Albert J. Bauknecht	(NE)	1995-96
Dr. M. L. Butterworth, Jr.	(ATL)	1968-69	Dr. Rick Schlapkohl	(AC)	1996-97
Dr. John H. Flower	(WC)	1969-70	Dr. James F. Walton	(NW)	1997-98
Dr. Robert M. Knight	(NE)	1970-71	Dr. Robert D. Pellarin	(C)	1998-99
Dr. Sherwood E. Moore	(ATL)	1971-72	Dr. Ronald Cantor	(EC)	1999-00
Dr. George W. Starks	(C)	1972-73	Dr. Stephen M. Krist	(WC)	2000-01
Dr. James W. Cospers, Jr.	(EC)	1973-74	Dr. Lewis C. Walker	(NE)	2001-02
Dr. Walter J. Watson	(NE)	1974-75	Dr. Maureen O'Flanagan	(AC)	2002-03
Dr. Kenneth W. Cooper	(WC)	1975-76	Dr. K. Randall Groh	(SF)	2003-04
Dr. William W. Dolan	(EC)	1976-77	Dr. Dan Henry	(NW)	2004-05
Dr. Charles W. Holmes, III	(WC)	1977-78	Dr. Roger Nofsinger	(C)	2005-06
Dr. Eli E. White, Jr.	(ATL)	1978-79	Dr. Glenn E. DuPont	(WC)	2006-07
Dr. Charles W. Hall	(EC)	1979-80	Dr. Christian Berdy	(NE)	2007-08
Dr. Robert L. Bunn	(ATL)	1980-81	Dr. Idalia Lastra	(SAC)	2008-09
Dr. Jack K. Whitman	(NE)	1981-82	Dr. Henry F. Pruett, Jr.	(NW)	2009-10
Dr. Edward L. Rose, Jr.	(ATL)	1982-83	Dr. Marcus O. Williams	(C)	2010-11
Dr. Hadley H. Hasemeier	(WC)	1983-84	Dr. James L. Carazola	(WC)	2011-12
Dr. Louis Pesce	(C)	1984-85	Dr. Richard Stevenson	(NF)	2012-13
Dr. Richard P. Lamb	(NW)	1985-86	Dr. John Ritota	(SAC)	2013-14
Dr. Charles Miller	(EC)	1986-87	Dr. Brian A. Tschirhart	(SAC)	2014-15
Dr. Allan Berry	(EC)	1987-88	Dr. James E. Martin, III	(NF)	2015-16
Dr. Thomas K. McCawley	(ATL)	1988-89	Dr. Timothy M. Lane	(C)	2016-17
Dr. Larry M. Sayre	(NE)	1989-90	Dr. James G. Wilson	(WC)	2017-18

FOUNDERS OF THE ACADEMY

Dr. Lindsey D. Pankey	Dr. Wilbur S. Coon
Dr. Lotus McGee	Dr. Thomas O'Flanagan
Dr. M. Lee Toothman	Dr. Blaine E. Jarett
Dr. Stanley Pirkle	Dr. E. Monroe Farber
Dr. Harry H. Hipson	Dr. William Hughes
Dr. William S. Robson	Dr. Andrew A. Henry
Dr. John E. Dalton	Dr. M. L. Butterworth, Jr.
Dr. Bruce E. Brooks	Dr. Carl Fogt

FELLOWS

Dr. M. L. Butterworth, Jr.	(NF)	Deceased
Dr. Peter E. Dawson	(WC)	Retired
Dr. Jesus L. Lastra	(SAC)	Retired
Dr. Thomas M. O'Flanagan	(SAC)	Retired
Dr. Earl L. Williams	(SAC)	Retired
Dr. Larry J. Cook	(NF)	Faculty

OFFICERS

Executive Council

Dr. James G. Wilson	(WC)	President (<i>representing SAC</i>)
Dr. Thomas H. Pyritz	(NF)	President-Elect
Dr. James F. Outlaw	(C)	Vice President/Secretary
Dr. Idalia Lastra	(SAC)	Treasurer
Dr. Timothy M. Lane	(C)	Immediate Past President (<i>representing WC</i>)

District Chairs

Dr. Chad Wright	(C)	2018-2021
Vacant	(NF)	
Dr. Lee Cohen	(SAC)	2018-2021
Dr. Kimberley Daxon	(WC)	2017-2020

Program Chair

Dr. William Layman	(WC)
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