THE CINCINNATI DENTAL SOCIETY

PRESENTS

FINANCIAL PLANNING SEMINARS FOR YOUNG DENTISTS

In your first years of practice you are just beginning to learn to manage your money. In most cases an insurance agent or stock broker has contacted you to invite you to purchase insurance annuities or mutual funds. The Cincinnati Dental Society believes that you need objective information and a certain foundation of knowledge about the financial planning process in order to make informed decisions about your long-term financial needs.

WHO: Dentists Graduating Between 1998 and 2008 Are Invited to Attend One or All Seminars

WHAT: Five Seminars on Financial Planning for Young Dentists
Presented by Neal Tew of Phalanx Advisors

WHEN: January 22, 2009
→ Topical Overview: Six Financial Planning Questions You Should Be Able To Answer:
  ▪ What will happen to me and my family if I’m in an accident and can’t work?
  ▪ What will happen to my family if I don’t wake up tomorrow?
  ▪ What’s the best way to manage my debt?
  ▪ How much do I need to save today to help my oldest child attend college?
  ▪ How much do I need to save to achieve quality of life after I retire?
  ▪ When do I need an attorney and why?

February 26, 2009
  ▪ Fundamentals of Life and Disability Insurance

March 26, 2009
  ▪ Strategies To Manage Your Debt

April 23, 2009
  ▪ Tips on Saving for Your Children’s Education

May 28, 2009
  ▪ Retirement Planning and Investing Strategies

TIME: 6:15 p.m. Dinner, 6:45 p.m. Remarks, 7:30 p.m. Q & A

WHERE: The Sheraton Cincinnati North Hotel, 11320 Chester Road, 513-771-2080

COST: $30 per Seminar/Person for Cincinnati Dental Society Members
  $45 per Seminar/Person for Non-Members
About the Speaker

Neal Tew founded Phalanx Advisors in 2007. Neal graduated from Harvard College in 1993, where he captained their national championship squash team, earned a magna cum laude degree in English Literature and was a member of the Phi Beta Kappa society. He earned a Masters Degree in Philosophy at Catholic University and worked in education for many years before entering the financial services industry. He currently holds his Series 6 and licenses for life, health, disability and long-term care insurance.

Neal’s focus on independent, best-in-class solutions, client education and the need for comprehensive strategies led him to establish Phalanx Advisors as an independent advisory firm in September 2007. Phalanx Advisors works directly for the client—they do not represent a bank, insurance company or investment house.

Mr. Tew serves on the board of the University Club of Cincinnati and is a member of the Corporate Council of the Cincinnati Art Museum. He lives in Mount Lookout with his wife and three children.

REGISTRATION FORM FOR FINANCIAL PLANNING SEMINARS FOR YOUNG DENTISTS

Neal Tew and Phalanx Advisors

Cancellation Policy: NO REFUNDS

Dentist: ____________________________ Phone Number: ______________

Attending:  □ January 22, 2009  □ February 26, 2009  □ March 26, 2009
□ April 23, 2009  □ May 28, 2009

Cost: Includes Dinner & Program for Each Seminar
$30 for CDS Members
$45 for Non-Members

To register for this course please make check payable to Cincinnati Dental Society and mail with this form to: 9200 Montgomery Road, Suite 21A, Cincinnati, OH 45242.

If paying by credit card, please complete this portion and fax to 513-984-3047.

Credit Card (MC or Visa Only) # ________________________________

Exp. Date ________________ Name on Card _____________________

Amount _____________