

# FORTUNE

Extraordinary Practice. Extraordinary Life.™

## 2026 ANNUAL PLANNING SESSION

FRIDAY DEC 5, 2025

6

CEs

9:00AM - 4:00PM

REGISTRATION : 8:30AM

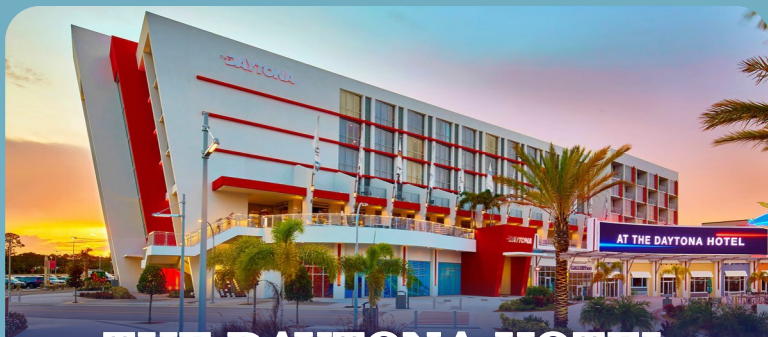
### ANNUAL PRODUCTION FORECAST, GROWTH PLAN, & GOAL SETTING WORKSHOP FOR 2026

Grounded in the transformative principles of The 5 Types of Wealth, this workshop is designed to align with Fortune's proven annual planning process — empowering you to create a purpose-driven roadmap that integrates financial success, personal fulfillment, and lasting impact for the year ahead.

#### THIS WORKSHOP WILL ALSO COVER:

- Annual Production Forecast & Growth Plan
- Goal setting workshop for 2026
- Outcomes and goals for all five Business Engines
- Creating a strong marketing plan to meet New Patient goals

**\$129** PER PERSON  
LUNCH INCLUDED



### THE DAYTONA HOTEL

1870 VICTORY CIRCLE | DAYTONA BEACH, FL

**NORTHEAST SEQUOIA**  
PRIVATE CLIENT GROUP

**SBDP**  
Swindell, Bohn, Durden & Phillips, P.L.  
Certified Public Accountants  
and Business Advisors



## The 5 Types of Wealth

### FACILITATORS



#### CID CARMONA

Executive Coach, Fortune

As a managing partner and executive coach for Fortune, Cid Carmona brings his background in the military, healthcare, and business arenas to assist healthcare professionals lead their teams and practices towards growth and success.

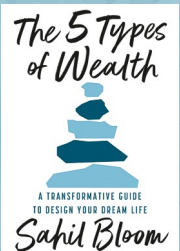


#### ALICIA MATHESON

Executive Coach, Fortune

As a public speaker and development coach, Alicia presents hard-hitting business content delivered in an innovative way to ensure understanding and practical delivery. She helps practices build stronger relationships while uncovering their secret sauce to creating unparalleled patient experiences.

THEME BASED ON THE  
BEST-SELLING BOOK  
BY SAHIL BLOOM



RSVP BY FRIDAY OCTOBER 31



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HOTEL  
BOOKING  
[bit.ly/4IK8f0h](https://bit.ly/4IK8f0h)

MORE INFO: KERRY KING

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**PACE**  
ACADEMY OF  
GENERAL DENTISTRY  
PROGRAM APPROVAL  
FOR CONTINUING  
EDUCATION

FORTUNE MANAGEMENT INC. - CA (Nationally or Locally)  
Approved PACE Program Provider for FAGD/MAGD credit.  
Approval does not imply acceptance by any regulatory  
authority or AGD endorsement. NOVEMBER 1, 2023 to  
OCTOBER 31, 2026 Provider ID# 304402