

# FORTUNE

Extraordinary Practice. Extraordinary Life.™

## 2026 ANNUAL PLANNING SESSION

FRIDAY NOV 14, 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



**PATTERSON DENTAL EDUCATION CENTER**

4030 SORRENTO VALLEY BLVD | SAN DIEGO, CA



### FACILITATOR



**BERNIE STOLTZ**

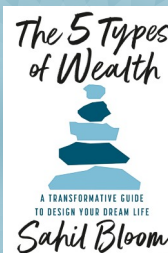
CEO & Executive Coach, Fortune

A seasoned motivator, public speaker, and acclaimed coach with over 30 years of business leadership in the healthcare community, Bernie Stoltz was the founder of five successful companies before joining Fortune over 25 years ago. Bernie has conducted thousands of training programs across the country to help thousands of doctors become their personal and professional best.

**\$98 PER PERSON**  
LUNCH & WORKBOOK INCLUDED

**\$199 PER PERSON** IF NOT A CURRENT FORTUNE CLIENT  
SPECIAL PROMOTION: \$499 FOR TEAM OF 5

THEME BASED ON THE  
BEST-SELLING BOOK  
BY SAHIL BLOOM



**RSVP BY THURSDAY OCTOBER 30**



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OR VISIT  
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**MORE INFO: ANDI MOORE**

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FORTUNE MANAGEMENT INC. - CA (Nationally or Locally)  
Approved PACE Program Provider for FAGD/MAGD credit.  
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OCTOBER 31, 2026 Provider ID# 304402