

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



THE DAYTONA HOTEL

1870 VICTORY CIRCLE | DAYTONA BEACH, FL

NORTHEAST SEQUOIA
PRIVATE CLIENT GROUP

SBDP
Swindell, Bohn, Durden & Phillips, PL
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

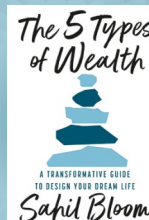
Executive Coach, Fortune

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

\$129 PER PERSON
LUNCH 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 FRIDAY OCTOBER 31



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OR VISIT
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HOTEL
BOOKING
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MORE INFO: KERRY KING

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PACE
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EDUCATION

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