

FORTUNE

Extraordinary Practice. Extraordinary Life.™

2026 ANNUAL PLANNING SESSION

FRIDAY JAN 9, 2026

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



COLLINGSWOOD GRAND BALLROOM

315 WHITE HORSE PIKE | COLLINGSWOOD, NJ



**PATTERSON
DENTAL**



FACILITATOR



BEN BUSH, CLU, ChFC

Managing Partner, Northeast
Sequoia Private Client Group

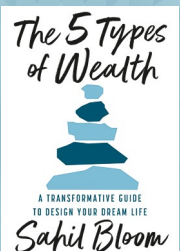
NORTHEAST SEQUOIA
PRIVATE CLIENT GROUP

\$89 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 WEDS DECEMBER 31



SCAN HERE
OR VISIT
bit.ly/3l9ntxU

MORE INFO: STEPHANIE COYLE

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PACE
ACADEMY OF
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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