

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



UCI RESEARCH PARK

5301 CALIFORNIA AVE STE 100 | IRVINE CA



FACILITATOR



BERNIE STOLTZ

CEO & Executive Coach, Fortune

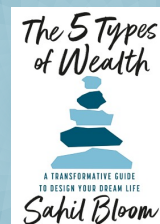
A seasoned motivator, public speaker, and acclaimed coach with over 30 years of business leadership in the healthcare community, Bernie Stoltz was the founder of five successful companies before joining Fortune over 25 years ago. Bernie has conducted thousands of training programs across the country 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 FRIDAY NOVEMBER 21



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OR VISIT
bit.ly/4nnC0ow

MORE INFO: SHERRY IRELAND

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FORTUNE MANAGEMENT INC. - CA (Nationally or Locally)
Approved PACE Program Provider for FAGD/MAGD credit.
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authority or AGD endorsement. NOVEMBER 1, 2023 to
OCTOBER 31, 2026 Provider ID# 304402