

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

5373 W SAM HOUSTON PKWY N #240 HOUSTON, TX


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DENTAL

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 **Swiss Monkey**

 **Burgmaier &
Associates, Inc.**
Certified Public Accountants



The 5 Types of Wealth

FACILITATOR



DR. BRIAN PASSELL
Executive Coach, Fortune

Dr. Brian Passell is an industrial / organizational psychologist who for the past decade has worked with major corporations improving their performance through strategies and programs that develop current and future leaders. Brian's areas of expertise include leadership and management skills development, human resources, culture building, performance management, change management, training and teams.

HOSTED BY



NATALIE SIMKINS
Executive Coach, Fortune

\$79 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
bit.ly/4n4IVE0

MORE INFO: NATALIE SIMKINS

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Approved PACE Program Provider for FAGD/MAGD credit.
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OCTOBER 31, 2026 Provider ID# 304402