



ROSEN SHINGLE CREEK® HOTEL  
NOVEMBER 14 - 16, 2019



## A MESSAGE FROM OUR PRESIDENTS



*On behalf of the entire Annual Meeting Committee, Meeting Chairman George J. Sabol, SWSO President Mike Ragan and myself, I extend you a warm Southern invitation to join us for the 2019 SAO/SWSO Combined Annual Meeting at the beautiful Rosen Shingle Creek Hotel Resort, Spa, and Conference Center.*

This little oasis of Spanish Revival theme is located on 255 acres at the head waters of the Florida Everglades and has a story of its own. The newly redesigned Arnold Palmer golf course will be the site of our Annual Golf Tournament on Thursday morning. Multiple Family- and Adults-Only Pools, First Class Food in private dining and food court styles and a lavish Spa all await you. The Hotel amenities are first class so take the time to have a 'Rosen Experience.'

The Annual Meeting Committee has a well-rounded meeting available with ample educational and vacation experiences for everyone. The presentation format offers multi-day New and Younger track, Dr/Staff track, Practice Management track and Evidenced Based tracks. We have many progressive speakers, Glen Krieger, Neal Kravitz, Anil Idiculla, with Travis Frederickson's Disney-inspired Dr/Staff talk as well as seasoned presenters Dr Robert McNamara, Jeffrey Okeson, Chris Chang, Roger Levin and many other quality lectures. There will be updates on the ABO's new program, the CAP from Katie Maassen, and the Legal Assistance Program from AAO legal counsel Sean Murphy.

We hope you enjoy all we have prepared for you at Rosen Shingle Creek Hotel. I echo Dr Ragan's comments that if there is anything we can do to enhance your experience, feel free to reach out to any member of the planning committee, combined SAO/SWSO staff or myself as we are happy to assist you. Now let's go learn new things and Party in Orlando!!

Dr Anthony W. Savage  
SAO President



*What better way to get away from the cold of early winter than by joining us in Orlando – the land of sun and family entertainment – together with my wife, Cindy, my girls, Abby and Caroline, and my Southwest family, the executive board, Dr Don Wilcoxon, Dr Bryn Cooper, and Dr Jesse Teng, and Trustee Dr Ken Dillehay.*

We are so glad you'll be here to share a great weekend of Education, Inspiration, and Entertainment - for you, your staff and your family. Along with the SAO executive board and the wonderful staff at Rosen Shingle Creek Hotel, we are at your service. We want you feel at home in the glorious South.



I want to thank the meeting planning committee and the SWSO/SAO staff for putting together what we hope to be a great program, exhibit hall, and opportunities to socialize with your friends and colleagues. This joint meeting of SWSO and SAO is the first of many fun and innovative meetings to come.

We want you to enjoy the meeting, parks, and wonderful resort. If there is anything we can do for you please let one of the staff know so we can make your experience something to remember!

Michael Ragan, DDS  
SWSO President



Rosen Shingle Creek®

## MEETING FACTS

**Meeting Date & Location:** Nov. 14 - 16, 2019  
Rosen Shingle Creek® Hotel Orlando  
9939 Universal Blvd. Orlando, FL 32819

**Hotel Room Rate:** The SAO/SWSO has contracted a standard room rate of \$229.00 at Rosen Shingle Creek. Secure your room by October 14th by registering for the meeting and a code will be provided. Visit [www.rosenshinglecreek.com](http://www.rosenshinglecreek.com) to learn more about the property.

**Getting to Orlando:** Meeting location is 12 miles from Orlando International Airport.

**Exhibition Hours and Onsite Registration:** Exhibits open on Thursday, Nov. 14 at 4:30pm, Nov. 15th & 16th at 9:00am. Registration opens daily at 7:00am.



**Badges and Event Tickets:** All registered attendees will receive badges and tickets for registered social events. All badges and lanyards can be picked up onsite at the SAO/SWSO Registration Desk beginning on Thursday at 7:00am.

**Dress Code:** Business casual.

**CE Vouchers:** Will be available onsite, online, and provided to AAO CE platform.

**Meeting App:** Meeting handouts and details will be available on the SAOSWSO19 meeting app.

**How to Register:** Register online at [saortho.org](http://saortho.org), [swso.org](http://swso.org), or [cvent.com/d/16qww4/4W](http://cvent.com/d/16qww4/4W) OR – You can choose to complete the enclosed registration form and return via fax (844) 214-1224, or mail to: 32 Lenox Pointe NE, Atlanta, GA 30324.

**Early Bird Discount Registration:** Available through Sept. 9th. Pre-register before Oct. 11th to avoid late fees.

**Completing the Registration:** Persons completing the enclosed registration form or online registration form are asked to register under the Practice Name and the Doctor's Name. Please annotate "Dr" in the "Title" section of the "Contact Information." This allows the staff to create uniform registration badges. Please remember to include allergy and disability information on the form.

**Late Fee and Cancellation Policy:** It is the policy of the SAO/SWSO to charge an additional \$30.00 fee after the pre-registration date, October 11th. All requests for refunds or cancellations must be made in writing to the SAO/SWSO prior to the pre-registration deadline of October 11th. A cancellation/processing fee of \$100 will be charged. No refunds will be given if cancellation is received after the pre-registration deadline. No refunds will be given onsite. Lunch tickets are non-refundable.

**No Smoking Policy:** No tobacco products, vaping, or smoking of any kind allowed.

**Entertainment Options:** Orlando offers entertainment for all ages, from theme parks to nightlife to fine dining and much more. Visit [www.visitorlando.com](http://www.visitorlando.com) and explore countless things to do while you're in town.

### QUESTIONS:

Contact SAO at [saoevents@saortho.org](mailto:saoevents@saortho.org) or call (404) 261-5528



## JOIN US FOR THE SAO GOLF TOURNAMENT SHINGLE CREEK GOLF CLUB

Thursday, November 14th 8:00am  
\$100.00 fee includes: greens fees,  
golf cart and breakfast. Club rentals  
are available for an additional fee.  
To register visit <https://bit.ly/2Jg5mnn>

# TEE TIME!

## SCHEDULE AT A GLANCE

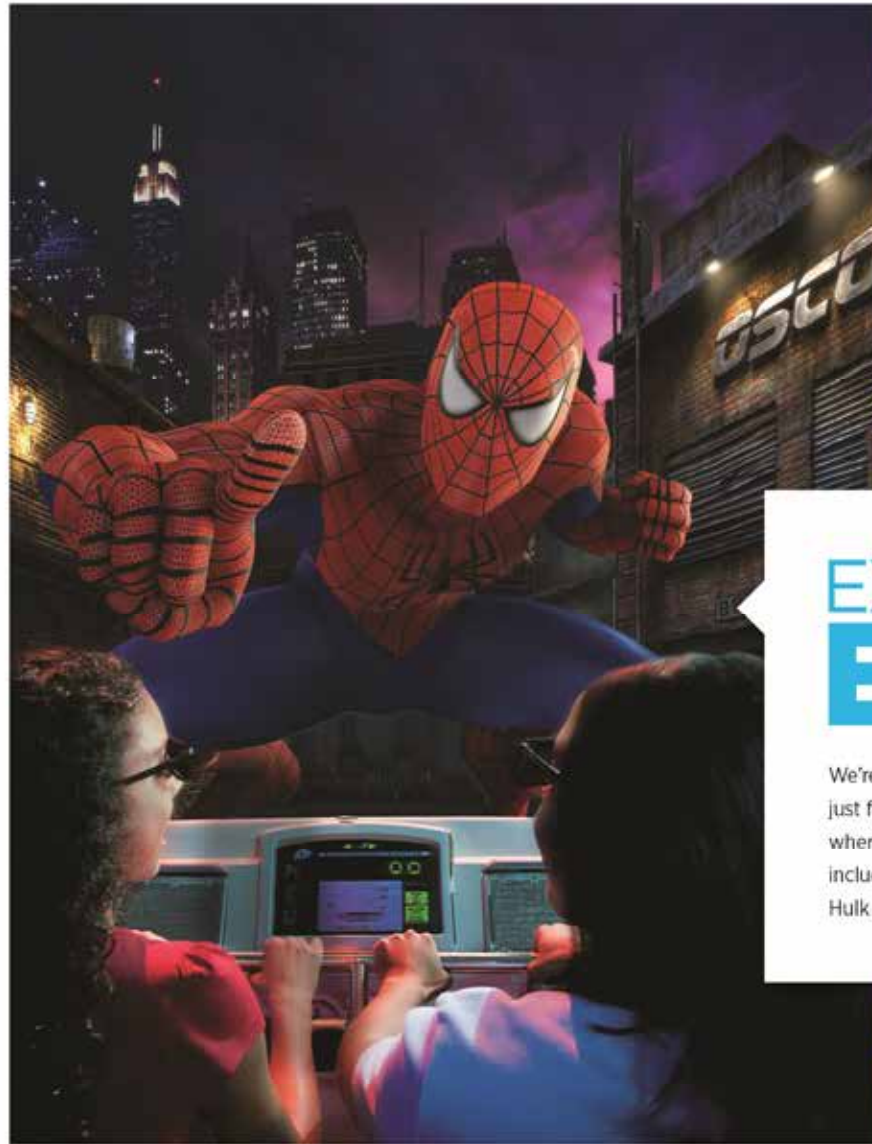
### LECTURE CODES:

C: Clinical Lecture  
 NC: Non-clinical, Non-credit  
 NY: New & Young Track

PM: Practice Management  
 S: Staff Track, Non-credit  
 SOC: Social Activities  
 BM: Business Meeting

### EXHIBITOR HOURS:

Thursday 4:30pm-6:30pm  
 Friday 9:00am-5:30pm  
 Saturday 9:00am-12:30pm



**EXPECT EPIC.** **UNIVERSAL ORLANDO RESORT**

We're throwing an exclusive party at Universal's Islands of Adventure™ just for you. We've reserved the park's Marvel Super Hero Island,\* where you'll have unlimited access to thrilling rides and attractions including The Amazing Adventures of Spider-Man,® The Incredible Hulk Coaster® and more.



**NOVEMBER 15, 2019 • 8:00PM - 11:00PM**

Park admission, dinner, and transportation are included

\$85/adult  
 \$65/child under 12

Register now online at [cvent.com/d/16qww4/4W](http://cvent.com/d/16qww4/4W)

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CODE	TIME	SPEAKER / EVENT	LECTURE / LOCATION	PAGE
<b>THURSDAY, NOVEMBER 14</b>				
SOC1	8:00am	Golf Tournament	Shingle Creek Golf Club	2
PM1	8:00am-9:30am	Dr David Paquette	The Future of Orthodontics	5
NC1	8:00am-9:30am	Scott Childress	Building Positive Reviews and Protecting Your Orthodontic Practice Reputation	5
C1	9:30am-11:00am	Dr Mike Ragan	Carriere' Motion - Sagittal First Treatment - A User's Guide	5
C2	12:00pm-1:00pm	Dr Bhavna Shroff	Accelerated Tooth Movement: What Works to Enhance Today's Practice?	6
NC2	12:00pm-2:30pm	Dr Dovi Prero	The Power of Prero Positivity: Growing Your Practice Through Optimism and Genuine Care for Your Patients	6
C3	12:00pm-3:00pm	Dr James E. Paschal	Digital Intelligence and Sagittal First: A New Era of Orthodontic Planning, Problem-Solving, and Patient Satisfaction	6
C4	12:00pm-4:30pm	Dr Jamie Gateno	3D Facial Analysis and Surgical Considerations	6
C5	1:00pm-4:30pm	Dr James McNamara	Implementing the Carriere Motion Appliance in the Treatment of CI I and CI III Malocclusion in a Private Practice Setting: Advantages and Pitfalls	6
NC3	2:00pm-3:00pm	Dr Eladio DeLeon, Jr.	American Board of Orthodontic Update	7
S1	2:30pm-4:30pm	Ms. Mari Sawtelle	Maximizing Your Inventory Dollars	7
NC4	3:00pm-4:00pm	Jaime Couden & Marshall Perez	Is Your Website Ready for 2020?	7
SOC2	4:30pm-6:30pm	Grand Opening Reception	Exhibit Hall Happy Hour	n/a
SOC3	6:30pm-10:00pm	SAO+SWSO Southern Celebration	Dinner, live music, dancing. <i>Sponsored by Sesame and Henry Schein One</i>	5
<b>FRIDAY, NOVEMBER 15</b>				
C6	8:00am-9:30am	Dr John Graham	Laser Enhanced Orthodontic Excellence	7
C7	8:00am-9:30am	Dr Chris Chang	Simplified Mechanics for Challenging Cases	7
PM2	8:00am-9:30am	Dr Kyle Fagala	Becoming a Digital Orthodontist: Top 10 Social Media and Website Tips	7
C8	8:00am-11:00am	Dr Jeffery P. Okeson	How Can the Orthodontist Help the TMD Patient	8
PM3	8:00am-11:00am	Dr Roger Levin	Keeping Your Practice Hot! How to Stay On Top in the New Era of Orthodontics	8
PM4	9:30am-11:00am	Dr Anil J. Idiculla	The Most Magical Job on Earth	9
C9	9:30am-11:00am	Dr Mazyar Moshiri	Understanding the Nuances of Comprehensive Clear Alignment Therapy	9
C10	10:00am-11:00am	Dr Chris Chang	Tough Cases Made Easy	9
C11	1:00pm - 2:30pm	Dr Chris Chang	Innovative Impaction Treatment	9
NY1	1:00pm-2:30pm	Dr Glen Krieger	Clinical Photography and Marketing to Grow Your Practice and Increase Case Acceptance	9
PM5	1:00pm-4:00pm	Dr Roger Levin	Marketing Your Way to Unlimited Referrals: Leading-Edge Strategies to Increase Referrals and Referral Sources	9
S2	1:00pm-4:00pm	Mr. Travis Frederickson	The Patient Experience; From Disney to Orthodontics	10
C12	1:00pm-4:00pm	Dr J. Martin Palomo	The 3D Airway and How to Manage OSA in a Busy Orthodontic Office	10
NY2	2:30pm-4:00pm	Dr Neal Kravtiz	A Return to Phase I Efficiency	10
C13	3:00pm-4:00pm	Dr Chris Chang	Gummy Smile Correction	10
SOC4	4:00pm-5:00pm	Exhibitor Hall Happy Hour	Free afternoon snacks, drinks, and shop the show specials	n/a
SOC5	8:00pm-11:00pm	Marvel's Super Hero Island	Transportation, dinner and park admission included <i>Sponsored by Henry Schein &amp; VAO</i>	3
<b>SATURDAY, NOVEMBER 16</b>				
PM6	8:00am-9:30am	Ms. Shannon Patterson & Mr. Chris Bentson	Orthodontic Consumer Trends that are Changing the Industry	11
NY3	8:00am-10:00am	Dr Sean Carlson	Beyond Straight Teeth: How 3D Imaging and Airway Awareness is Elevating Orthodontics into a Vital Healthcare Specialty	11
C14	8:00am-10:00am	Dr J. Martin Palomo	Using CBCT in Clinical Orthodontics	11
S3	8:00am-11:00am	Mr. Travis Frederickson	The Patient Experience; From Disney to Orthodontics	11
C15	9:30am-11:00am	Dr Francisco Eraso	The Clinical Impact of Radiology Interpretation - A systematic Approach to CBCT Analysis	11
NY4	10:00am-11:00am	Dr Mark McInnis	Digital Efficiencies Incorporated into the Modern Workflow	12
C16	10:00am-11:00am	Dr Lina Sharab	Clinical Tips for Managing Third Molars with a Piece of Mind!	12
NC5	12:30pm-2:00pm	Dr Mike Ragan & Ms. Katie Maassen	How the AAO is Promoting YOU to the Public!	12
S4	12:30pm-2:00pm	Dr Neal Kravitz	A Guide to People Management: Understanding Your Patients' and Staffs' Personality Types	12
NC6	12:30pm-2:00pm	Mr. Sean Murphy	Advocating on behalf of the AAO Orthodontist	12
NY5	12:30pm-2:00pm	Dr John Wise	Sleep Apnea: The Orthodontic Connection	12

**CELEBRATE YOUR SUPER POWERS**

**JOIN IN THE FUN!**

**SAO SWSO SOUTHERN CELEBRATION**

**SUPERHERO COSTUME PARTY**

**THURSDAY, NOV. 14  
6:30PM - 10:00PM**

**ROSEN SHINGLE CREEK  
THE GATLIN TERRACE**  
Outdoor event includes live music and dinner.

## COURSE DESCRIPTIONS

### THURSDAY, NOVEMBER 14

**The Future of Orthodontics**  
**Dr David Paquette | 8:00am - 9:30am | 1.5 CEUs | PM1**  
 Technology changes affect most areas of our lives, and our orthodontic practices are no different. As these changes mount, orthodontists and their teams have many questions. Dr David Paquette will explore these technologies and the way they are changing the profession of orthodontics. He'll explain the ways offices implement change and how to harness the fear of losing control and start controlling your future.

- Learning Objectives:
- How to adapt to change
  - When is the right time to implement change
  - Communication and practice-management solutions

**Building Positive Reviews and Protecting Your Orthodontic Practice Reputation**  
**Scott Childress | 8:00am - 9:30am | 0 CEU | NC1**  
 Local Search Directories such as Google My Business, Facebook, and Apple Maps are more important than ever – and business reviews often take center stage. We'll go in-depth with strategies for building authentic, positive reviews while providing insight into preventing negative reviews. We'll discuss how to easily track what's being said about you online along with how to develop a game plan for unhappy patients.

- Learning Objectives:
- Understand how online reviews affect practice growth
  - Discover how reviews can often be more important than search-engine rank
  - Develop strategies to build reviews on the websites that matter most
  - Minimize the risk and effects of negative reviews on your dental practice

**Carriere' Motion - Sagittal First Treatment - A User's Guide**  
**Dr Mike Ragan | 9:30am - 11:00am | 1.5 CEU | C1**  
 We will discuss how to use and integrate the motion appliance in your everyday practice. Starting with types of cases to treat, anchorage requirements and fitting and sizing, and we will finish with bonding techniques, removal, and how to proceed with treatment and retention. This overview is not just for the first-time user. We will discuss some more advanced techniques and uses for current users.

- Learning Objectives:
- Treatment types and integration into the practice
  - Techniques for anchorage, bonding and removal
  - Advanced techniques and uses of the appliance

**Accelerated Tooth Movement: What Works to Enhance Today's Practice?**  
**Dr Bhavna Shroff | 12:00pm - 1:00pm | 1 CEUs | C2**  
 Dr Bhavna Shroff obtained her DDS at University Paris V, her certificate in Orthodontics and Masters in Dental Sciences at University of Connecticut. She is a Professor and the Graduate Program Director in Orthodontics at VCU. She was awarded a Masters in Public Administration at VCU in 2008. Dr Shroff has lectured nationally and internationally. She is currently the Graduate Program Director in Orthodontics at VCU School of Dentistry in Richmond, VA. She is a past member and chair of the COSA and the past president of the North Atlantic Component of the Angle Society. Dr Shroff is the National Secretary of the EHASO. Dr Shroff's research interests include the mechanisms of tooth eruption and the biology of tooth movement, and she has attracted intramural and extramural funding from NIDR, the AAOF, and the AD Williams foundation. Dr. Shroff has published extensively in the areas of tooth development and eruption, biomechanics and appliances design, and clinical orthodontics. Dr Shroff is certified by the American Board of Orthodontics. She is a fellow of the American College of Dentists and the International College of Dentists.

- Learning Objectives:
- Understand the fundamental mechanisms of accelerated tooth movement
  - Evaluate and choose the techniques that can optimize treatment length in your practice
  - Evaluate the quality of the scientific evidence to support the use of such techniques in current practice

**The Power of Prero Positivity: Growing Your Practice Through Optimism and Genuine Care for Your Patients**  
**Dr Dovi Prero | 12:00pm - 2:30pm | 0 CEU | NC2**  
 Graduating from University of Southern California in 2014, Dr Prero founded his start-up practice in Beverly Hills. Through his passion for caring for patients and creating relationships with them, he was able to grow his practice and along the way purchase two more practices and combine them all into one. All the while broadcasting his message through social media, directly educating the public of the power of the orthodontic specialty. Learn his tips and tricks that create meaningful connections with his community: patients, doctors, and organizations.

- Learning Objectives:
- How the ability to have a positive outlook can create opportunities for your practice
  - How to care about patients beyond orthodontic care
  - How to convey this message on social media

**Digital Intelligence and Sagittal First: A New Era of Orthodontic Planning**  
**Dr James E. Paschal | 12:00pm - 3:00pm | 3 CEUs | C3**  
 Powered by new technologies, orthodontic practices are relying on new techniques and digital applications to achieve new levels of clinical excellence. Dr Paschal will share how digital intelligence and the motion appliance can increase clinical efficiencies, effectiveness, and overall patient satisfaction. All orthodontists should pay close attention to the evolution of the Sagittal First and Digital Workflows within today's orthodontic practice.

- Learning Objectives:
- Understand how technology can positively impact the orthodontic practice
  - Learn how to incorporate technology efficiently
  - Recognize the future standard of care in the orthodontic arena

**3D Facial Analysis and Surgical Considerations**  
**Dr Jamie Gateno | 12:00pm - 4:30pm | 4.5 CEUs | C4**  
 With the support of the National Institutes of Health, our team at Houston Methodist Hospital has completed the development of AnatomicAligner, a new computer program for surgical planning. Among its many innovations, the program has an intelligent algorithm that can automatically calculate the frame of reference for a face, even when the whole head is asymmetric. The program also employs a new approach to clinical cephalometry. In the new 3D scheme each facial unit is considered to be a geometric object, with independent size, position, orientation, shape, and symmetry. Each one of these geometric characteristics is measured using modern morphometric methods. Besides, AnatomicAligner has optimized the whole process of surgical simulation so that surgeries can be planned quickly and accurately. No more wasted time. The program can also design surgical guides, occlusal splits, and hardware for rapid manufacturing. In the presentation, we will showcase AnatomicAligner, and we will show how we use the software to plan complex operations, like facial asymmetries, craniofacial deformities, and distraction osteogenesis.

- Learning Objectives:
- The audience will learn how to build a 3D frame of reference for the face, even when the face is asymmetric
  - The participants will understand how shape, size, position, orientation, and symmetry can be accurately measured
  - Attendants will realize the optimal planning sequence for orthognathic surgery

**Implementing the Carriere Motion Appliance in the Treatment of CI I and CI III Malocclusion in a Private Setting: Advantages and Pitfalls**  
**Dr James McNamara | 1:00pm - 4:30pm | 3.5 CEUs | C5**  
 The focus of Dr McNamara's presentation is the Carriere Motion appliance. Initially called the Carriere Distalizer by its innovator Dr Luis Carriere of Barcelona, this appliance system first was used in Class II correction. The protocol for all Carriere patients treated at McNamara Orthodontics will be described in detail as will some of the clinical management problems encountered. The results of a recent retrospective clinical study will demonstrate the treatment effects produced by the Carriere 2 appliance. The second part of the presentation will focus on what the speaker considers a novel approach to Class III treatment. The Carriere 3 can be used not only in adolescents but also in adults. The primary treatment effect is the distalization of the lower posterior teeth (lower third molar extraction is essential). The Carriere 3 also can be used in mixed dentition patients in combination with a bonded acrylic splint expander to which hooks in the upper molar region have been added.

#### Learning Objectives:

- Understand the clinical protocol that is used for the management of the Carriere 2 and Carriere 3 appliance system
- Become aware of the treatment effects produced by both types of the Carriere appliance
- Gain an understanding of the clinical problems encountered and learn how to avoid them

#### American Board of Orthodontic Update

Dr Eladio DeLeon, Jr. | 2:00pm - 3:00pm | 0 CEU | NC3

Learn what to expect, the domains tested, and how the existing ABO measuring instruments are integrated into the new testing format.

#### Maximizing Your Inventory Dollars

Mari Sawtelle | 2:30pm - 4:30pm | 2 CEUs | S1

As competition for orthodontic patients continues to grow, orthodontists are focusing even more on controlling costs and running their practices efficiently to increase margins and profit. Managing your inventory system and ordering is a powerful way to add to your practice's bottom line, while making small but critical mistakes can quickly add up to significant costs. It is also critical in today's orthodontic landscape to adapt your business strategies to the rapidly changing market, particularly the growing presence of DIY aligner companies.

#### Learning Objectives:

- Learn how to evaluate your inventory system and set your inventory person up to truly succeed
- Learn where to find great prices, save big on the little things that add up, and make sure you are getting real value for every inventory dollar you spend, while still getting the best quality product
- Learn strategies to be more competitive in the ever-increasing competitive orthodontic arena, especially with DIY companies.

#### Is Your Website Ready for 2020?

Jaime Couden & Marshall Perez | 3:00pm - 4:00pm |

0 CEU | NC4

Patients have more access to information than ever before, giving them many choices when it comes to finding an orthodontist, so you need to have the best website in town. You also probably get called with website solicitations several times a week, and each caller likely has a differing opinion of what changes need to be made to your website. It's hard to know who to trust. Join Jaime and Marshall as they walk you through the top 20 elements your website needs to be patient friendly and get the phone ringing. You will leave the class with a handy checklist for you to go through on your own website to see how you stack up.

#### Learning Objectives:

- Understand the latest and greatest in website trends for the upcoming 2020 year
- Learn what Google is looking for when deciding how to rank your website
- Set your practice apart from competition

## FRIDAY, NOVEMBER 15

#### Laser Enhanced Orthodontic Excellence

Dr John Graham | 8:00am - 9:30am | 1.5 CEUs | C6

Great orthodontic finishing goes well beyond tooth alignment. Just as excellent finishing is difficult without hard tissue recontouring during and after treatment, it's also difficult without carefully considering the gingival architecture. A keen eye for clinical crown display and gingival symmetry is the mark of an excellent clinician. Dr Graham will discuss the primary objectives of post-treatment gingival analysis and laser recontouring. Dr Graham will also examine the virtues of his laser of choice, the Spectrum Laser.

#### Learning Objectives:

- Learn how to critically evaluate anterior gingival architecture as it relates to smile design
- Understand the elements necessary for excellent gingival recontouring at the end of orthodontic treatment, including anesthetic technique, laser setup, clinical execution and post treatment protocols
- Learn the key requirements necessary when choosing a diode laser

#### Simplified Mechanics for Challenging Cases

Dr Chris Chang | 8:00am - 9:30am | 1.5 CEUs | C7

This lecture features well-documented cases to help clinicians create and execute easy and logical treatment plans. The supporting basic biomechanical principles will be explained. Critical evaluation of extraction vs. non-extraction will also be highlighted in the lecture. The goal is to convince you how you CAN treat these difficult cases easily with the powerful combination of self-ligation system and mini screws.

#### Learning Objective

- Attendees of this lecture will be able to differentiate various screw placement locations recommended for impactions in different positions

#### Becoming a Digital Orthodontist: Top 10 Social Media and Website Tips

Dr Kyle Fagala | 8:00am - 9:30am | 1.5 CEUs | PM2

Learn how to grow your orthodontic practice by engaging your audience on social media and attracting new patients to your website. In this lecture Dr Kyle Fagala shares his Top 10 digital marketing secrets for social media sites like Facebook and Instagram. He discusses best practices for SEO, web design, blogging, and Google Ads, plus he recommends

# Orthovation

## Leading Innovation For Today's Leading Practices

Orthovation is a live-office replica of an orthodontic practice – staged in the Exhibit Hall for you to tour during SAO19 Orlando. Walk up for a guided tour, tours will be 30-40 minutes long and provided by SAO members educated on all products. This is an opportunity to discuss new innovations with colleagues and make side-by-side comparisons.

how to stop wasting time on Facebook by delegating social media management. Lastly, Dr Kyle recommends 5 digital tools to optimize one's time, leaving room for the things that are most important in our lives and practices.

#### Learning Objectives:

- Be able to engage your audience on social media and attract new patients to your website
- Be able to recognize best practices for social media sites like Facebook and Instagram
- Be able to recognize best practices for SEO, web design, blogging, and Google Ads

#### How Can the Orthodontist Help the TMD Patient?

Dr Jeffery P. Okeson | 8:00am - 11:00am | 3 CEUs | C8

Patients are often referred to the orthodontist for the management of TMD. Is this a reasonable referral or a naïve approach? As an orthodontist, do you encourage these referrals or dread them? This presentation will discuss when orthodontic therapy should be considered for the TMD patient and when it should be avoided. Nothing is more discouraging to the patient, and the orthodontist, than to finish the case and have the patient report, "but it still hurts." This presentation will discuss issues that will help reduce these unfavorable results.

#### Learning Objectives:

- List three important questions that should be asked before orthodontic therapy is considered
- Describe the most critical examination finding that would influence your selection of orthodontic therapy for a TMD patient
- Describe the orthodontic treatment goals that would be appropriate for the TMD patient

#### Exhibit Hall events include:

- Children's superhero custom contest
- Happy hour socials
- Lunch with the exhibitors
- Meeting specials

#### Keeping Your Practice Hot! How to Stay On Top in the New Era of Orthodontics

Dr Roger Levin | 8:00am - 11:00am | 3 CEUs | PM3

This seminar will bring attendees the newest battle-tested strategies from highly successful orthodontic practices. Orthodontics is about to face a "competition explosion Service. It all adds up to building a powerful reputation with referring doctors and in the community that creates total patient satisfaction, positive online reviews and unprecedented practice efficiency. The goal is to maximize profitability and start more new patients." And practices that are preparing for it today will excel in the future. Top practices have redesigned and implemented innovative new systems ranging from patient-centered scheduling to the first new patient phone call to the Treatment Coordinator process to 5-Star Customer.

#### Learning Objectives:

- Design a 1-hour TC Process to close up to 90% of new patients
- Understand the reality of down payments and monthly payments and why they may be hurting close rates
- Implement scheduling policies that allow the practice to attract new patients, WOW them on the phone and close them in one appointment

### The Most Magical Job on Earth

Dr Anil J. Idiculla | 9:30am - 11:00am | 1.5 CEUs | PM4

Prepare to discover the fun and magical aspects of orthodontics. We will get back to the root of why we do what we do and see life through the eyes of a child again!

#### Learning Objectives:

- Attendees of this lecture will be able to rediscover the fun of orthodontics
- Attendees of this lecture will be able to implement key strategies to help grow their practices
- Attendees of this lecture will be able to reflect on who our customer truly is and be able to satisfy their needs

### Understanding the Nuances of Comprehensive Clear Alignment Therapy

Dr Mazyar Moshiri | 9:30am - 11:00 | 1.5 CEUs | C9

Aligners have cemented their place as a viable orthodontic treatment modality. Yet, like fixed appliances, there are many nuances to learn in order master predictable results. Join us as we push the envelope of the appliance, and discuss considerations for scalable predictability and results.

#### Learning Objectives:

- Learn the major considerations for a proper digital treatment plan
- Learn the main considerations for treatment of Deep Bites, Open Bites, and Orthognathic Surgical cases
- Learn how to avoid posterior open bite, and how to finish them when they occur

### Tough Cases Made Easy

Dr Chris Chang | 10:00am - 11:00am | 1 CEUs | C10

Self-ligation systems combined with mini screws and other orthodontic auxiliaries enable clinicians to create efficient and reliable force systems to solve a wide range of challenging cases. In this lecture, I will demonstrate how to approach common difficult cases, including sagittal, vertical and horizontal problems with simple and reasonable treatment planning. Interdisciplinary treatment of complex adult cases will also be discussed.

### Innovative Impaction Treatment

Dr Chris Chang | 1:00pm - 2:30pm | 1.5 CEUs | C11

Temporary anchorage devices (TADs) have proven to be extremely reliable and effective in impaction treatment in various positions and many other skeletal malocclusions. Buccal shelf screws are particularly useful in the camouflage treatment of severe Class III treatment and lower anterior impaction, Ramus screws are ideal in uncovering lower deep horizontal impaction. IZC screws are recommended in the correction of Class II, upper anterior impaction and protrusion. Detailed biomechanics analysis and treatment protocols will be discussed in dealing with these challenging clinical scenarios.

### Clinical Photography and Marketing to Grow Your Practice and Increase Acceptance

Dr Glen Krieger | 1:00pm - 2:30pm | 1.5 CEUs | NY1

Everyone is looking for increased case acceptance, a way to stand out, and get better orthodontic outcomes. Well, there's an easy way to get all three with minimal investment and it'll even decrease your stress levels. Learn how to capture exceptional clinical images, use them for better case acceptance and take your practice and practice culture to the next level.

#### Learning Objectives:

- How to capture exceptional images every time
- How to use exceptional images to increase case acceptance
- The one image that will grow your practice

### Marketing Your Way to Unlimited Referrals: Leading Edge Strategies to Increase Referrals and Referral Sources

Dr Roger Levin | 1:00pm - 4:00pm | 3 CEUs | PM5

Absolutely nothing is more critical to orthodontic practice success than referrals – and they come from many different sources today. The orthodontic specialty is about to undergo a “competition explosion” which will fragment practices into 4 tiers of differing success. Practices that understand and effectively implement referral marketing strategies in FIVE FOCUS AREAS will land in the top two tiers and thrive! The FIVE FOCUS AREAS include referral marketing strategies for:

1. The Branded Patient Rewards and Referral Program
2. The Parent Ambassador Program
3. The Social Media Interface Program
4. The Referring Doctor Driver Program
5. The Community Full Awareness Program

Sample strategies for all FIVE FOCUS AREAS will be taught along with the practical implementation recommendations. It will also be essential for orthodontic practices to have 5-Star Customer Service (and it is about FAR more than simply being nice). Customer service is not an accident and 5-Star Customer Service is a true practice differentiator. Every team member needs detailed training in 5-Star Customer Service to help set your practice apart. In this seminar Dr Levin will present numerous specific strategies and scripts that can be implemented in your practice immediately. This will take the customer service in your practice to the next level, allowing you to stand out with both patients and your referring doctors.

#### Learning Objectives:

- Understand why referral marketing in FIVE FOCUS AREAS is now essential to increasing and maintaining referrals
- Design the role of the Marketing Coordinator to create a winning marketing program
- Implement a 5-Star Customer Service program to exceed patient, parent and referring practice expectations every time

### The Patient Experience; From Disney to Orthodontics

Travis Frederickson | 1:00pm - 4:00pm | 3 CEUs | S2

Every day prospects and patients make decisions on starting treatment in your office based upon one thing – EXPERIENCE. It's experience that matters. Experience is the determining factor in each stage of engagement – from when people first become aware of your practice, to when and if they will refer others. Doctors and assistants training prepare them to take care of the issues involved with orthodontics, but where do they learn about creating an experience? That is the question that author, speaker, and coach Travis Frederickson asked nearly 15 years ago. His best-selling book, *The Patient Experience, 4 Lessons from Disney to Dentistry*, is an industry leader.

#### Learning Objectives:

- Participants will compare an experience in orthodontics to Disney
- Participants will understand what it means to have and use the “Big Picture”
- Participants will comprehend the components of an exceptional staff

“Please help us be **SUPERHEROES** by helping the fight for healing cancer-stricken children by donating to the *Adam Michael Rosen Foundation*, named in his honor. Our combined effort will make a difference for these families.”

– Dr Anthony W. Savage  
SAO President



#### MISSION:

The mission of the Adam Michael Rosen Foundation, Inc. honors the life and fight Adam gave in his battle against cancer by aiding others in their fight.

#### ABOUT:

The Adam Michael Rosen Foundation, Inc. was created by the Rosen Family to honor the life and fight Adam gave in his battle against cancer by aiding others.

#### DONATIONS

During the 2019 Annual Meeting, donation forms will be available at the registration desk. Or, donations can be made by sending a check payable to the Adam Michael Rosen Foundation at 9840 International Drive Orlando, FL 32819

facebook.com/adammichaelrosenfoundation/

### The 3D Airway and How to Manage OSA in a Busy Orthodontic Office

Dr J. Martin Palomo | 1:00pm - 4:00pm | 3 CEUs | C12

Traditionally we are trained to see and analyze the airway from only the lateral view on a cephalometric film. But the airway is a three-dimensional (3D) structure, and that third dimension may be hiding something relevant to our diagnosis. This presentation will highlight some of the airway research from Case Western Reserve University, and will show how different commercially available programs can be used to analyze the airway volumetrically, how the airway is different for different craniofacial situations, and what happens to the airway when we extract or expand as part of our treatment plan. With more than 80 respiratory disorders, the orthodontist can play a big role helping children and adults, especially regarding Obstructive Sleep Apnea (OSA). This presentation will show how the orthodontist can help identify and manage OSA in pediatric and adult patients, from using oral appliances, to surgical movement of the jaws, and newest hypoglossal stimulation methods. When moving from 2D to 3D, distances and angles turn into areas and volumes, and understanding the airway may take orthodontics to the next level, increasing the scope of what can be done clinically.

#### Learning Objectives:

- Learn to incorporate OSA risk assessment in a busy orthodontic office
- Understand the role an orthodontist may play when dealing with OSA patients
- Understand how to assess the airway using CBCT

### A Return to Phase I Efficiency

Dr Neal Kravitz | 2:30pm - 4:00pm | 1.5 CEUs | NY2

Are we really achieving our goals in Phase I? How many Phase I patients endure 18 months of treatment only to pursue another 18 months of comprehensive treatment? And how many have early root resorption, decalcifications, and still need extractions following Phase I expansion? This lecture focuses on improving Phase I Efficiency. Discover Dr Kravitz's philosophies on common Phase I problems and pick up a few clinical pearls along the way!

#### Learning Objectives:

- Discover Phase I treatment pearls
- Learn Phase I retention strategies
- Review Dr Kravitz's protocol for common problems

### Gummy Smile Correction

Dr Chris Chang | 3:00pm - 4:00pm | 1 CEU | C13

An innovative approach to correct gummy smile will be presented. The upper whole arch intrusion and retraction by Temporary Anchorage Devices (TADs) has been proved to be an effective way to improve gummy smile. This lecture will start with diagnosis and treatment planning of gummy smile. Detailed mechanics and screw insertion techniques will be introduced. The rationales for surgical crown lengthening to finalize the smile will also be included

#### Learning Objective

- Attendees of this lecture will be able to articulate the esthetic principles of anterior smile design

## SATURDAY, NOVEMBER 16

### Orthodontic Consumer Trends that are Changing the Industry

Shannon Patterson & Chris Bentson | 8:00am - 9:30am | 1.5 CEUs | PM6

The vertical dimension of the posterior part of the dentition markedly affects the functional positioning of the mandible and consequently the way the condyles adapt during growth. Altered vertical dimension therefore contributes to the development of skeletal malocclusion. The inclination and position of the occlusal plane relative to the craniofacial complex are vitally important in the diagnoses and treatment of malocclusions. Different studies have indicated that a steep posterior occlusal plane induces a backward rotation of the mandible and a forward adaptation of the jaw is readily observed on those having a flat posterior occlusal plane. The development of skeletal malocclusion such as Class III, Class II, Openbite and MLD cases are clearly distinguished by their respective posterior occlusal plane configuration. The neuromuscular system adapts to articular function which in turn induces skeletal adaptation. Therefore, the control of the vertical dimension of the posterior teeth is extremely necessary in the treatment of malocclusion.

### Beyond Straight Teeth: How 3D Imaging and Airway Awareness is Elevating Orthodontics into a Vital Healthcare Specialty

Dr Sean Carlson | 8:00am - 10:00am | 2 CEUs | NY3

The creation of a 3D virtual patient using CBCT imaging is now a reality. Simply focusing on teeth is underutilizing the power of orthodontic treatment to improve not only a patient's smile, but their physical health as well. This presentation focuses on how to integrate CBCT into overall patient care and the importance of dynamic modeling for treatment planning. Dr Carlson will use numerous case examples to share his story of practice transformation since installing his first CBCT machine in 2008. The advantages of a 3D approach in diagnosis, airway analysis, treatment planning, and patient communication will be discussed. He will also discuss many challenges that make it difficult for clinicians to change from 2D diagnosis to 3D diagnosis and why this change is essential for the future of orthodontics.

#### Learning Objectives:

- After this lecture, you will be able to incorporate airway health into their practice
- After this lecture, you will learn the advantages of a 3D vs. 2D practice and why you will never go back to 2D
- After this lecture you will have an understanding of the fundamentals of CBCT technology and dosimetry

### Using CBCT in Clinical Orthodontics

Dr J. Martin Palomo | 8:00am - 10:00am | 2 CEU | C14

The digital volumetric tomography era has begun, and we now have access to significant additional diagnostic information. When should an orthodontist use a 3D image? Is Cone Beam Computed Tomography (CBCT) going to replace the cephalogram? Dr Palomo was part of a special committee

formed by oral maxillofacial radiologists and orthodontists whose goal was to determine when to use CBCT in clinical orthodontists. This presentation will show how CBCT is changing the way we practice, and show how Case Western Reserve University (CWRU) is extracting and using volumetric tomograms for orthodontic reasons. From posterior buccolingual inclination to surface area analysis and volumes, Dr Palomo will show current protocols and recommendations on when and how to use this 3D imaging modality that is quickly becoming part of the orthodontic practice.

#### Learning Objectives:

- Attendants will understand how 3D imaging can provide more diagnostic information than 2D imaging
- Attendants will learn how to analyze the transverse dimension in three dimensions
- Attendants will learn how to superimpose and evaluate outcomes in three dimensions

### The Patient Experience; From Disney to Orthodontics

Travis Frederickson | 8:00am - 11:00am | 3 CEUs | S3

Every day prospects and patients make decisions on starting treatment in your office based upon one thing – EXPERIENCE. It's experience that matters. Experience is the determining factor in each stage of engagement – from when people first become aware of your practice, to when and if they will refer others. Doctors and assistants training prepare them to take care of the issues involved with orthodontics, but where do they learn about creating an experience? That is the question that author, speaker and coach Travis Frederickson asked nearly 15 years ago. His best-selling book, *The Patient Experience, 4 Lessons from Disney to Dentistry*, is an industry leader.

#### Learning Objectives:

- Participants will compare an experience in orthodontics to Disney
- Participants will understand what it means to have and use the "Big Picture"
- Participants will comprehend the components of an exceptional staff

### The Clinical Impact of Radiology Interpretation - A Systematic Approach to CBCT Analysis

Dr Francisco Eraso | 9:30am - 11:00am | 1.5 CEU | C15

Dr Eraso will take advantage of his dual training in Orthodontics and Oral & Maxillofacial Radiology to guide the orthodontic clinicians in the process of radiology interpretation. Through a systematic review, Dr Eraso will teach you how to navigate and interpret the maxillofacial structures three-dimensionally; he will give us a global vision of the impact of understanding the CBCT volumetric information for our daily orthodontic diagnosis and treatment plans.

#### Learning Objectives:

- To understand how to navigate the maxillofacial images three-dimensionally
- To impact our diagnosis and treatment plans with an adequate CBCT interpretation
- To learn how to review our CBCT systematically and differentiate clearly normal vs. abnormal/anomaly

### Digital Efficiencies Incorporated into the Modern Work Flow

Dr Mark McInnis | 10:00am - 11:00am | 1 CEUs | NY4

A retrospective look at how digital technologies have made modern practices more efficient. Digital efficiencies gained through 3D treatment planning. Removing the barriers practices often place on themselves, inhibiting the implementation of new technology. Efficacy, Expense, Time. Digital work flow with in house aligner fabrication. Additional benefits obtained through in house aligners. For your practice: freed-up cash flow at start of treatment and higher profitability. For patients: lower down payments, shorter wait times, and lower cost treatment options. Predictions for the future.

#### Learning objectives:

- Efficacy, profitability and work flow for fabrication of in-house aligners

### Clinical Tips for Managing Third Molars with a Piece of Mind!

Dr Lina Sharab | 10:00am - 11:00am | 1CEU | C16

Third molars develop, mature, and erupt during a critical stage of human development. This timing coincides with orthodontic treatment for the majority of our orthodontic patients. Since orthodontists have a significant impact on decisions regarding space management and stability, they are frequently asked for guidance and recommendations for the management of third molars. Referring practitioners, patients and insurers inquire frequently about the prognosis of third molars and whether and when to recommend extraction. What is the most current, clinically relevant information that may affect orthodontists' decisions regarding third molars? This lecture will provide a scientific update to answer this question.

#### Learning Objectives:

- Recognize the clinical significance of third molar development and the impact of these teeth on occlusion
- Assess third molar development and determine the appropriate treatment based on current scientific evidence
- Manage third molars using current recommendations for everyday practice

### How the AAO is Promoting YOU to the Public!

Dr Mike Ragan & Katie Maassen | 12:30pm - 2:00pm | 0 CEU | NC5

Gain insight into ways members can benefit from the CAP – including through the "Find An Orthodontist" locator.

#### Learning Objectives:

- Learn about materials and online creative available for members to share for free, such as through social media
- Gain insight into ways members can benefit from the CAP – including through the "Find An Orthodontist" locator
- Learn how the AAO is working to educate the public and promote orthodontists as specialists

### A Guide to People Management: Understanding Your Patients' and Staffs' Personality Types

Dr Neal Kravitz | 12:30pm - 2:00pm | 1.5 CEUs | S4

The DiSC theory is a popular classification system originating in the 1920's that categorizes all individuals into four primary

behavior types: D - Dominant; I-Influential; S - Steady; and C - Conscientious. The aim of the DiSC theory was to categorize people by their temperaments in order to improve interpersonal relationships. In other words, if we know how people behave, we will know how to treat them. For the orthodontist, understanding DiSC will increase case closure, highlight which patients are challenging to treat, and aid in hiring the appropriate staff. Teaching DiSC is my absolute favorite subject, and I promise this will be one of the most important lectures you will hear.

#### Learning Objectives:

- Understand DiSC theory
- Learn to modify your consult based on the patient's behavior type
- Discover how to spot the dreaded C-personality and finish their treatment successfully

### Advocating on Behalf of the AAO Orthodontist

Sean Murphy | 12:30pm - 2:00pm | 0 CEU | NC6

The lecture will cover some of the advocacy topics that arise with orthodontics. The lecture will provide insight on everything from specialty advertising to teledentistry.

#### Learning Objectives:

- After this lecture, you will be able to better understand the AAO's federal advocacy efforts
- After this lecture, you will be able to better understand the AAO's state advocacy efforts
- After this lecture, you will be able to better understand how you can advocate on behalf of your profession

### Sleep Apnea: The Orthodontic Connection

Dr John Wise | 12:30pm - 2:00pm | 1.5 CEUs | NY5

Obstructive sleep apnea (OSA) is a hot topic. OSA is unique because it crosses over into the medical AND dental fields. Orthodontics is healthcare. The two disciplines – medicine and dentistry – must work together to achieve good outcomes for our patients. The subject resonates with our referring offices and our patients who understand the consequences of poor sleep. Many times, the condition can be passed along genetically from generation to generation. Whether its genetic or environmental or some combination, there is no doubt that OSA effects the entire family and the community at large. In this presentation, we will look into the sleep apnea world and examine the interactions between medical and dental providers. Screening, referral, diagnosis, and treatment routines for our patients will be discussed. The orthodontic appliances used routinely as part of the orthodontic armamentarium will be presented along with patient identification and treatment outcomes.

#### Learning Objectives:

- Participants will understand the interconnection necessary between medical providers and orthodontists
- Attendees will have a foundational knowledge of screening techniques to be used in their offices
- Attendees will leave with an understanding of the orthodontic appliances and treatment protocols that are effective in managing sleep apnea patients

## ABOUT THE SPEAKERS



**Chris Bentson** is a partner of Bentson Copple & Associates, LLC based in Greensboro, North Carolina. The company serves the orthodontic community by performing practice valuations, providing recruiting services, and negotiating transactions with both buyers and sellers.

Chris serves as Editor-in-Chief of the Bentson Copple reSource, a quarterly newsletter focused on the business aspects of running a successful orthodontic practice. Chris has authored dozens of articles published on the business of orthodontics in numerous orthodontic trade publications. Chris has personally visited over one thousand orthodontic practices in the United States, Canada, and Australia during his career. He enjoys excellent relationships with consultants and vendors within the orthodontic community.



**Dr. Sean Carlson** is a Board-Certified Orthodontist who received his dental degree from Harvard University in 1994. He received both his Orthodontic Specialty training and his Master of Science degree in Oral Biology from the University of California at San Francisco in 1998. Dr. Carlson is an Associate Professor of

Orthodontics at the University of the Pacific School of Dentistry and in private practice in Mill Valley, California. He has published numerous articles and abstracts in the orthodontic literature and lectures nationally and internationally on CBCT in orthodontic practice. In 2017, Dr. Carlson founded the company OrthoScience, Inc., which aims to revolutionize orthodontic education, information sharing, and commerce by creating a worldwide network of clinicians and their validated treatment data.



**Dr. Chris Chang** is the founder of Beethoven Orthodontic Center and Newton's A Inc. in Hsinchu, Taiwan. He received his PhD in Bone Physiology and Certificate in Orthodontics from Indiana University. He is a Diplomate of the American Board of Orthodontics and an active member of Angle Society – Midwest. Dr. Chang

is the publisher of JDO and has authored and co-authored many orthodontic books, including *Orthodontics Vols. 1-6*, as well as *Words of Wisdom*, *Jobsology* and *Trumpology*. He is the inventor of OrthoBoneScrews (OBS®).



**Scott Childress**, Executive Director of Smile Savvy, has spent the last seven years directing the development of websites, social media accounts, local search listings and review building campaigns for over 1,000 pediatric dentists and orthodontists across forty-seven states and six countries. A graduate of Liberty

University, Scott spent over 13 years in the nonprofit world using modern outreach tools for an increasingly tech-savvy donor base. An early adopter of social media, he has been marketing on Facebook since its inception.



**Jaime Couden** has been working in the digital marketing world, specifically in the Dental industry, for over 11 years. Working with orthodontists and their teams while helping them build successful, thriving practices is her passion. Currently Jaime manages a team of sales professionals at Sesame Communications, headquartered in the heart of Downtown Seattle (go Seahawks!)

She is a Seattle native and graduated from the University of Washington with a degree in political communication. When she's not out helping doctors, she is traveling the world, at a football game, or spending time with Bear, her hundred-pound black lab.



**Dr. Eladio DeLeon, Jr., D.M.D., M.S.** Marvin C. Goldstein Chair of Orthodontics Program Director of Post Graduate Orthodontics Past-president, American Board of Orthodontics

Dr. Eladio DeLeon, Jr. is a graduate of the University of Kentucky where he received his

D.M.D. and he completed his Orthodontic Residency training and received his orthodontic certificate and M.S. degree at the University of Missouri, Kansas City. Dr. DeLeon served twenty two years of active service in the U.S. Army Dental Corps retiring as a full Colonel 20 years ago.

Dr. DeLeon is a Past Director of the American Board of Orthodontics and he continues to serve on ABO Written examination Committee and as an examiner for the clinical portion of the certification examination. Dr. DeLeon will assume the position of Commissioner for Orthodontics for the Commission of Dental Accreditation in 2019. He also is a Diplomate of the American College of Dentists, and the International College of Dentists.



**Dr. Francisco Eraso** is an Orthodontist and Oral and Maxillofacial Radiologist. He received his D.D.S. from Pontificia Universidad Javeriana, Bogotá, Colombia, his advanced standing dental degree from Indiana University School of Dentistry, his M.S. in Oral Biology from the University of Louisville, his certificate and M.S.

in Oral and Maxillofacial Radiology from The University of North Carolina at Chapel Hill, and his Orthodontic Certificate and M.S.D. from Indiana University. Currently Dr. Eraso practices Orthodontics in Indianapolis, is one of the founder radiologists of Beamreaders, Diagnostic Services and a Volunteer/Adjunct Associate Professor in the Department of Orthodontics at Indiana University.



**Dr. Kyle Fagala** is the owner and orthodontist at Saddle Creek Orthodontics, with two locations in Germantown and Collierville, Tennessee. He is also co-founder of the digital marketing agency Neon Canvas and host of The Digital Orthodontist: Live! Dr. Kyle graduated from UT Memphis in 2013 with a

certificate in orthodontics and a master's degree in Dental Science for his thesis on 3D imaging of the airway. Dr. Kyle is the course director and lecturer of Development of the Occlusion, a class for first year dental students at the University of Tennessee Health Science Center and a Key Opinion Leader for 3M Oral Care and Komet Burs.



**Travis Frederickson** Commissioned by Creating Change in 2005, Travis conducted a thorough research project in consumer satisfaction in medical and dental practices resulting in the development of tools and training for monitoring and improving medical/dental office consumer satisfaction. Those

same tools currently help Practice Wow manage the elements of Practice Excellence necessary to achieve the desired results. Travis authored the Amazon best-seller, *The Patient Experience: 4 Lessons from Disney to Dentistry*, in 2013, and *The Patient Experience; 4 Lessons from Disney to Healthcare* in 2014; *The Highly Effective Dental Practice* in 2015; *The Orthodontic Experience* in 2018; and *The Blend* in 2018. Travis is recognized as the leading authority in the dental patient experience by many in the industry including Howard Farran and Gary Takacs.



**Dr. Jaime Gateno** is Chairman of the Department of Oral and Maxillofacial Surgery and Hospital Dentistry at Houston Methodist Hospital in Houston, Texas. He is also a Professor of Clinical Surgery (Oral, and Maxillofacial Surgery) at Weill Medical College of Cornell University and is voluntary

faculty at the Department of Orthodontics at UT-Houston School of Dentistry. Dr. Gateno received his Dental Surgery degree at the University of Panama and his MD degree from the Medical College of Pennsylvania. He has received at more than 15 grants in support of his research, including NIH funding for his project on Computer Surgical Simulation for Craniofacial Surgery.



**Dr. John Graham** earned his Bachelor of Science degree from Brigham Young University and his dental degree from Baylor College of Dentistry in Dallas, Texas. Dr. Graham received his medical degree from the University of Texas Southwestern Medical School, also in Dallas, Texas. Following his surgical training, Dr.

Graham received his certificate in orthodontics from the University of Rochester/Eastman Dental Center in Rochester, New York. Dr. Graham is one of only a few orthodontists in the United States who is also a licensed physician. An innovator and educator, Dr. Graham lectures worldwide to both doctors and staff on advanced orthodontic treatment philosophies, as well as pediatric obstructive sleep apnea diagnosis and treatment.



**Dr. Anil Idiculla** is an Invisalign® Diamond provider at his five Denver-area orthodontic practices. He is honored to be the only doctor in Colorado to be elected as an Invisalign Faculty Member. He received his undergraduate degree from the prestigious University of Pennsylvania in Philadelphia, his hometown.

He then attended Nova Southeastern University Dental School in Florida on an academic scholarship graduating summa cum laude, number one in his class. Most recently, his peers and patients have selected him as their Top Orthodontist in Colorado, as seen in *5280 Magazine* every year since opening in 2008.



**Dr. Neal Kravitz** is a Diplomate of the American Board of Orthodontics, member of the Edward Angle Honor Society, and Associate Editor for the *Journal of Clinical Orthodontics*. Dr. Kravitz is a graduate of Columbia University and received his D.M.D. and the University of Pennsylvania. He is also a prolific writer for

numerous journals. Dr. Kravitz lectures throughout the country and internationally on treatment planning, biomechanics, practice management, and ethics.



**Dr. Glenn Krieger** was a restorative dentist for 20 years before becoming the oldest orthodontic resident in the U.S. when he returned to school in 2012. He is the administrator of the Orthopreneurs and OrthopreneursRD Facebook groups and has several blogs including Orthopreneurs.com,

DentalPhotography.blogspot.com, and DentalSherpa.com. He has lectured around the globe since 1999 and holds the title of "Distinguished Lecturer" at Nova Southeastern University and has been named "Top Clinician in CE" ten times by *Dentistry Today Magazine*. Dr. Krieger practices in Lewisville, TX and lives in the Dallas area with his wife of 23 years, his 3 kids, Cody the Wonderdog, and Finn the Wonderpup.



**Dr. Roger Levin** has dedicated his career to improving the lives of dentists and specialists. Dr. Levin is the Chairman and CEO of Levin Group, Inc., a leading orthodontic management consulting firm that has worked with over 26,000 dentists and specialists. The author of 68 books and more than 4,300 articles, he is a regular

contributor to JADA, Dental Economics, Orthodontic Products Online and other industry publications. He has been interviewed by The Wall Street Journal, The New York Times and Time magazine. For 13 consecutive years, he has been named one of the "Leaders in Dental Consulting" by *Dentistry Today*. Recently, he was honored to be named one of the "32 Most Influential People in Dentistry" by Benco's Incisal Edge magazine and one of "The 10 Most Interesting Dentists" by *Dentist's Money Digest*.



**Katie Maassen** is the Director of Marketing and Communications for the American Association of Orthodontists. Prior to joining the AAO in February 2017, Katie worked for TEGNA Media (formerly Gannett), specializing in the area of digital marketing. During her career in the media, Katie helped hundreds of companies

nationwide (as well as TEGNA media properties) to develop and execute digital marketing strategies that worked for them. Some of her favorite marketing campaigns included the 2012 London and 2016 Rio Olympics on NBC. Katie received her undergraduate degree from the University of Missouri, and is a proud St. Louis native. Go Cardinals!



**Dr. Mark McInnis** is a native of South Carolina and has practiced orthodontics in the tri-county area for two decades. Born and raised in Darlington, he received his BS from Francis Marion College in 1989. He attended the Medical University of South Carolina where he received his Dental Medicine Degree (DMD) in

1996, and completed his orthodontic residency at the University of Missouri, Kansas City in 1998. Dr. McInnis subsequently returned to the upstate. He is a member of the SCDA, the ADA, the SAO and the AA.





**Dr. Jim McNamara** has been an orthodontic resident, doctoral student, university professor, teacher and researcher, international lecturer, and private practitioner during his long and productive career. His broad experience in both clinical and experimental arenas and his worldwide travels have provided him a unique

opportunity to synthesize an approach to orthodontics and dentofacial orthopedics that not only is evidence-based but also is focused on the art of orthodontics. His treatment protocols have evolved steadily since the early 1970s, most recently to include the Carriere appliance.



**Dr. Mazyar Moshiri** is an Invisalign® Elite Provider at his private practice in St. Louis, Missouri. A featured speaker in Ask the Expert webinars, he is a lead educator for Class II and Deep Bite solutions. As an Assistant Clinical Professor at the Saint Louis University Center for Advanced Dental Education, Dr Moshiri

lectures and provides clinical oversight on Invisalign treatment. He is a Diplomate of the American Board of Orthodontics, and Fellow of the American College of Dentists.



**Sean Murphy, Esq.** is the Vice President, Advocacy and General Counsel, for the American Association of Orthodontists (AAO). Sean joined the AAO in 2016, and his responsibilities include overseeing the AAO's state Component Legal Support Fund, serving as the treasurer for the AAO's Political Action

Committee (AAOPAC), and helping oversee the AAO's legal and legislative issues. For 2019, Sean was selected by Association TRENDS as a leading lobbyist for the 2019 Salute to Association Excellence event. Sean received his bachelor's degree from Augustana College (Rock Island, IL) and his law degree and Health Law Certificate from Saint Louis University School of Law, which is frequently ranked as the top health law program in the country.



**Dr. Jeffery Okeson** is Professor, Division Chief and Director of the Orofacial Pain Program at the University of Kentucky. Dr Okeson has more than 240 publications and has authored two textbooks on TM disorders and orofacial pain which have been translated into eleven different languages. Dr Okeson has presented

more than 1,300 invited lectures on the subject of TMD and orofacial pain in all 50 states and in 58 foreign countries. He has received numerous teaching awards including 'The International Dentist of the Year Award' from the Academy of Dentistry International.



**Dr. J. Martin Palomo** is a tenured professor, the Orthodontic Residency director, and the Craniofacial Imaging Center director at Case Western Reserve University in Cleveland, Ohio. Dr Palomo's contributions to craniofacial imaging, informatics, and airway analysis have been recognized through medical and dental research

awards, national and international presentations, and numerous peer-reviewed publications. He is currently part of the AAO task force that is creating guidelines for orthodontists, regarding obstructive sleep apnea. Dr Palomo is a board-certified orthodontist, an Angle Society member, and an active member of American Association of Orthodontists, the American Academy of Oral and Maxillofacial Radiology, and the American Academy of Sleep Medicine.



**Dr. David Paquette** received his DDS in 1979 and his MS in Pediatric Dentistry in 1983 from the UNC School of Dentistry. His Master's thesis in pediatric dentistry won the AAPD research award that same year. He obtained his specialty certificate in orthodontics and MSD in orthodontics in January 1990 from

St. Louis University. His Master's thesis in orthodontics won the Milo Hellman award in 1991. He is actively involved in ongoing research utilizing the latest technological advances in orthodontic appliances and computers to enhance both patient treatment and office efficiency. He is a founding member of the Henry Schein Orthodontics Sleep Apnea Task force and holds the position of Clinical Affairs Director at Henry Schein Orthodontics.



**Dr. James "Jep" Paschal** received his Bachelor of Science degree from Emory University in 1989 and his Doctorate of Medical Dentistry in 1993 from the Medical College of Georgia. He continued his education at the University of Texas Health Science Center at San Antonio completing a residency in Prosthodontics, a

Master of Science degree in Biomaterials & Prosthodontics, and a General Practice Residency in 1997. Dr Paschal maintained a private practice in Prosthodontics and Implant Dentistry for five years before returning for a residency in Orthodontics at the University of Rochester Eastman Dental Center. Dr Paschal currently maintains a private orthodontic practice in both Madison and Lake Oconee, GA.



**Shannon Patterson** is a recruitment leader in the orthodontic industry, specializing in placement and retention of doctors by engaging in a proactive recruitment strategy. She is also a Kolbe Certified™ Consultant and expert in the Kolbe suite of assessments for selection of the ideal candidate match,

focusing on strength-based relationships for doctors. Shannon joined Bentson Copple & Associates, LLC in 2011 and became a partner in the firm in 2018. She has earned certifications in High Impact Recruiting (CPR) and Certified Medical Staff Recruiting (CMSR), and is a Certified Kolbe Consultant and member of the American Academy of Medical Management (AAMM).



**Marshall Perez** brings over ten years of consultative problem-solving experience to Sesame Communications with the last six focused in the Dentistry vertical. For the last three years he has developed expertise in creating custom-tailored marketing strategies, streamlining practice efficiencies, and

promoting brand awareness in local communities. He currently leads a team of Solutions Consultants and Market Development Representatives.



**Dr. Dovi Preto** is a Board-Certified Orthodontist in Beverly Hills, CA. He founded his practice on quality treatment outcomes and creating a strong referral base from dentists. His practice has grown through building a brand of selfless service to his patients and his community, while harnessing the power of Instagram to spread

his message. He focuses on the power of clear communication and exceeding his patients' expectations. He believes that your only competition is looking at you in the mirror. Give to your colleagues, give to your patients, and give to the world.



## College of Diplomates of the American Board of Orthodontists (CDABO) Prep Course

Held in conjunction with the SAO/SWSO Annual Session at the Rosen Shingle Creek Hotel Orlando

**DATE:** Sunday, November 17

**TIME:** 7:00am - 3:00pm  
(lunch on own 11:30am - 12:30pm)

**FEE:** \$490 orthodontist or \$290 resident

**COURSE INCLUDES:** 7 CE credits, ABO measuring gauge, coffee breaks

For additional information and to register directly with the College please visit: [bit.ly/collegeprep117](http://bit.ly/collegeprep117)

If you have questions call 888-217-2988 or email [association.info@icloud.com](mailto:association.info@icloud.com)

**Space is limited to 50, assigned on a first-come basis**



**Dr. Michael Ragan** operates a private practice in Dallas, TX. Graduated with honors from Baylor College of Dentistry, and post graduate training in Orthodontics at Nova Southeastern University serving as Chief Resident and Alumni President. Dr Ragan currently serves the AAO via SWSO as President and the representative

to COC and is proud to have been selected as COC Chair. Dr Ragan enjoys speaking in a variety of subjects including Class II correction, Early Treatment, and Sports Dentistry and the 3D workflow, however his passions include traveling, sports and most importantly, spending time with his family.



**Mari Sawtelle** started her orthodontic career as a lab tech, and over the next 25 years became a nationally award-winning rep and trainer for 'A' Company, Ormco, Invisalign, and GAC. She created the inventory formulary system, negotiated pricing, and saved the practice a million dollars during her first year. Mari

founded Sawtelle-Dunn Consulting in 2012 and created her own buying group: Mari's List®. Mari's List leverages the buying power of nearly 1,700 members to negotiate discounts with a growing list of 110 companies and service providers, and coaches members on how to master their inventory systems and maximize savings.



**Dr. Lina Sharab** is an Assistant Professor at the University of Kentucky College of Dentistry at the Division of Orthodontics. Dr Sharab received her dental degree from Syria, and her master's degree of science in biomaterials and fellowship in orthodontics from the State University of New York at Buffalo School of

Dental Medicine. She completed her MS in orthodontics at the University of Kentucky. She is a board-certified practices orthodontics at UK. Dr Sharab has received multiple awards from

both the University of Kentucky and other institutions for research, teaching, and leadership.



**Dr. Bhavna Shroff** obtained her DDS at University Paris V, her certificate in Orthodontics and Masters in Dental Sciences at University of Connecticut. She is a Professor and the Graduate Program Director in Orthodontics at VCU. She was awarded a Masters in Public Administration at VCU in 2008. She is currently

the Graduate Program Director in Orthodontics at VCU School of Dentistry in Richmond, VA. Dr Shroff's research interests include the mechanisms of tooth eruption and the biology of tooth movement and she has attracted intramural and extramural funding from NIDR, the AAO, and the AD Williams foundation. Dr Shroff has published extensively in the areas of tooth development and eruption, biomechanics and appliances design, and clinical orthodontics.



**Dr. Wise** is a second-generation orthodontist who graduated from Baylor College of Dentistry in 1987 and the University of Texas Health Science Center Department of Orthodontics in 1992. Wise is co-founder of the Collin County Airway Network – a local study group in his home community – and

has spoken at local CCAN sleep apnea conferences. In May of 2019, Dr Wise presented to the American Society of Pediatric Otolaryngology as part of their Sleep Apnea panel. As a private practice orthodontist, Dr Wise made the leap into modern orthodontics in 2008 when he adopted 3D imaging and CAD/CAM processes for many of his treatment regimens.

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