

UPDATED
Aug 24



Centennial Celebration of the Southern Association of Orthodontists

SAO&Education SAO&Advocacy SAO&Relationships SAO&Charity SAO&Governance SAO&Teambuilding

October 7-9, 2021 • Le Méridien Hotel in Charlotte, NC



Start Your Engines!

A Message from the President

Dear Colleagues,

On behalf of the SAO, I would like to invite you to join us in beautiful Charlotte for the SAO's 100th anniversary celebration. Charlotte, known in the South as the Queen City, is a business and financial hub and is the second largest city in the Southeast. It is home to the NFL's Carolina Panthers, the NBA's Charlotte Hornets, and it is a NASCAR epicenter and home to the NASCAR Hall of Fame.

We have an exciting program that will allow members to reflect upon and celebrate our past accomplishments, renew friendships and explore current and future visions. We hope that you will have a productive and fun-filled time at this

very special meeting. We planned an outstanding opening ceremony that will honor members of our great profession as well as entertain the audience. On Friday evening, you won't want to miss our Southern Celebration at the NASCAR Hall of Fame. Our meeting concludes on Saturday afternoon with a tailgate celebration as we host a college football watch party by the pool.

Our General Chairman, Dr. Chris Howell, and I look forward to welcoming you to the Queen City as we gather in person to celebrate our 100th Anniversary, reflect on our rich history and enjoy the camaraderie that is unique to the SAO.

Sincerely,

Dr. Sims Tompkins
SAO President



Questions?

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

Follow Us on Social Media

Get meeting updates, look for colleagues and share in the excitement of #SAO2021.

Facebook: @saoevents
Instagram: @saortho



SAO Charlotte Need to Know

Meeting Date & Location

October 7-9, 2021 at Le Méridien Charlotte
555 S. McDowell St, Charlotte, NC 28204

Hotel Rooms: Le Méridien & Sheraton

The SAO has contracted a standard room rate of \$239 at Le Méridien and \$224 at adjoining hotel, the Sheraton Charlotte. *Secure your room by September 25 by registering for the meeting and a code to book hotels will be provided.*

Getting to Charlotte

Meeting location is seven miles from Charlotte Douglas International Airport (CLT).

Exhibition Hours & Onsite Registration

Exhibits open on Thursday, Oct 7 at 2:00 pm, and on Oct 8 & 9 at 7:30 am. Registration opens daily at 7:30 am.

Badges & Event Tickets

Registered attendees will receive badges and tickets for registered social events. Badges and lanyards can be picked up onsite at the SAO Registration Desk beginning Thursday at 7:30 am.

Dress Code

Business casual.

CE Vouchers

Will be available onsite, online, and provided to the AAO CE platform.

Meeting App

Meeting handouts and details will be available on the SAO21 meeting app.

How to Register

Register online at saortho.org, or <https://bit.ly/3rANLwf>. 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.



Chic Sophistication at Le Méridien

Early Bird Discount Registration

Available through August 6. ~~Pre-register before September 7 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 "Contact Information." This allows the staff to create uniform registration badges. Please remember to include allergy and disability information on the form.

Cancellation Policy UPDATED Aug 23, 2021

To provide maximum flexibility with travel planning during COVID, cancellation requests can be made up until October 6. All requests for refunds or cancellations must be made in writing to the SAO. A cancellation/processing fee of \$100 will be charged. No refunds will be given onsite. Lunch tickets are non-refundable.

No Smoking Policy

No tobacco products, vaping, or smoking of any kind allowed.

COVID-19: We reserve the right to enforce PPE requirements as required by Mecklenburg County and Le Méridien and the Sheraton Charlotte. Any person entering the event waives all civil liability against the SAO for any injuries caused by the inherent risk associated with contracting COVID-19.



SAO & The Queen City

Charlotte offers thrilling adventures, a magnetic nightlife, delicious food options and fun breweries. There is so much fun to be had as you explore this charming city.

Things to do in Charlotte

FOOD

Stagioni, Good Food on Montford, Barrington's, Atherton Mill & Market, 5Church, Fahrenheit, Haymaker

BREWERIES & DISTILLERIES

The Olde Mecklenburg Brewery, Lenny Boy Brewing Co., NoDa Brewing Company, Doc Porter's Distillery, Dragon Moonshine Company

NIGHTLIFE

AvidXchange Music Factory, The Comedy Zone Charlotte, VBGB Beer Hall & Garden

OUTDOORS & ADVENTURE

U.S. National Whitewater Center, Carowinds, UNC Charlotte Botanical Gardens, Crowders Mountain State Park

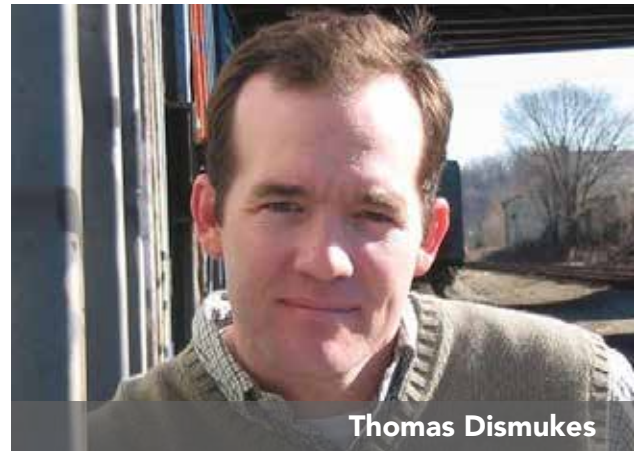
FAMILY FRIENDLY

Discovery Place Science, Ray's Splash Planet, SEA LIFE Charlotte-Concord Aquarium

LE MÉRIDIDIEN & UNLOCK ART

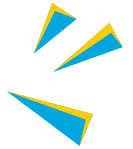
Le Méridien Charlotte participates in the Unlock Art program with the Mint Museum of Art. Guests present their Le Méridien room key at the museum ticket office and receive one complimentary self-guided tour of the museum. Stop by the front desk to receive a special "key" to unlock the art program before your visit!

Additional resources to plan your travel can be found at charlottesgotalot.com



Thomas Dismukes

Opening Ceremony & Keynote Speaker



Thursday, Oct 7 3:00-4:30 pm

Our 100th meeting opens with a grand Opening Ceremony for all — members, team members, exhibitors and sponsors! We'll recognize and celebrate our peers who have served our association, and hear from Keynote Speaker Thomas Dismukes — an expert in the inexplicable pursuit of a life in balance.

For more than 20 years and across 19 countries, audiences roll with laughter and applaud with inspiration at this man who does more than motivate and educate... he touches people's lives. As the author of the best-seller, "A Leader's FOCUS," Thomas's influence extends far beyond the podium.

Never turning down an opportunity for a good story or a miserable time, Thomas's true life adventures range from sleeping in dumpsters in England to exploring the Arctic Circle. He's survived bareback rodeos, skunks in space suits and electrocution in Sweden. He's walked through the Alps barefoot, lassoed a wild beaver, broken a World Record and was nearly drowned by an irrational goose.

Thomas has a unique ability to discern a meaning behind the madness, and describe principles everyone can relate to, laugh at and apply to their lives. We all strive to balance our personal and professional lives, to be remembered, and to live a life of significance. More often than not, the problems and struggles we endure are the direct result of an improper focus. It is this balance and significance one can find while mastering A Leader's FOCUS. Don't miss this unforgettable SAO keynote event as Thomas inspires you and your team to do your best and get the best out of life.

SAO Schedule at a Glance

LECTURE CODES:

DT: Dental Team
 PM: Practice Management
 C: Clinical Lecture
 B: Business Meeting

Thursday, October 7

	7:30 am	Golf Tournament	Golf at Springfield Golf Club*, <i>Sponsored by Ormco & Spark</i>
DT1	9:00 am – 10:00 am	Mr. Adam Bozeman	Actionable Tips for Ensuring Your Practice is Highly Visible Online, <i>Sponsored by Sesame</i>
PM	9:00 am – 10:00 am		Lecture: Acquire Tax Credits for your Research and Development
DT2	10:00 am – 11:00 am	Ms. Jaime Couden	Top Website Trends for 2022: What Your Website Needs to be Effective in the Coming Year, <i>Sponsored by Sesame</i>
C11	10:00 am – 12:00 pm	Dr. Mehdi Peikar	BRIUS®: The Third Way to Move Teeth, <i>Sponsored by Brios</i>
PM1	11:00 am – 12:00 pm	Mr. Wade Coleman Mr. Jonathan Martin	What's Happening with Orthodontic DSOs <i>Sponsored by the McGill & Hill Group</i>
DT3	11:00 am – 12:00 pm	Ms. Jaime Couden	The Patient Journey, <i>Sponsored by Sesame</i>
	12:00 pm – 1:00 pm	Box Lunch	Thursday Box Lunch, available for purchase
PM2	1:00 pm – 2:30 pm	Mr. Sean Murphy	Navigating Legal Issues for the Modern Orthodontic Practice
	2:30 – 3:00 pm	Refreshment Break	Complimentary, in the Exhibit area
	3:00 pm – 4:30 pm	Mr. Thomas Dismukes	100th Anniversary Opening Ceremony*
	4:30 pm – 7:30 pm	Exhibit Hall Happy Hour	Network & nosh with businesses and members — together again!
	6:30 pm – 7:30 pm	Resident Happy Hour	For Residents only

Friday, October 8

B1	7:00 am – 8:00 am	CDABO Breakfast	Breakfast meeting with CDABO peers
C2	8:00 am – 11:00 am	Dr. Mazyar Moshiri	A Contemporary Review of Predictable Mechanics: Deep Bite and Class III Correction with Invisalign
C3	8:00 am – 9:15 am	Dr. Clark Colville	Lightforce 3D Printed Braces: The Next Generation of Fully Customized Braces
DT4	8:00 am – 4:00 pm	Ms. Debra Engelhardt-Nash	"Up Your Service" Customer Service Skills for the Dental Team
	9:15 am – 9:45 am	Refreshment Break	Complimentary, in the Exhibit area
PM3	9:45 am – 11:00 am	Mr. Timothy Donoghue	Marketing in the Digital Space and Changes that Would Benefit Offices Post-COVID
B2	11:00 am – 12:00 pm	General Assembly	General Assembly meeting of the SAO
	11:30 am – 1:00 pm	Box Lunch	Friday Box Lunch, available for purchase
B3	12:00 pm – 1:00 pm	VAO Business Meeting	For Virginia Association of Orthodontists Members Only
C1	1:00 pm – 2:15 pm	Dr. John Warford	The Virtual Lifestyle, <i>Sponsored by Spark</i>
C4	1:00 pm – 4:00 pm	Dr. Regina Blevins	Maximizing Success Treating Growing Patients with Invisalign
C5	1:15 pm – 2:15 pm	Dr. Eric Wu	The 4 C's of Tomorrow's Clear Aligner Therapy
	2:15 pm – 2:45 pm	Refreshment Break	Complimentary, in the Exhibit area
C6	2:45 pm – 4:00 pm	Dr. John Warford	Dental Monitoring and Virtual Orthodontics
	4:00 pm – 6:00 pm	Exhibit Hall Happy Hour	Network & nosh with businesses and members
	7:00 pm – 10:00 pm	Southern Celebration	NASCAR Hall of Fame, <i>Sponsored by Sesame</i>

Saturday, October 9

C7	8:00 am – 11:00 am	Dr. Scott Frey	Efficient Class 2 Correction with Invisalign
PM4	8:00 am – 11:00 am	Ms. Debra Engelhardt-Nash	Speaking Financially
PM5	8:00 am – 9:15 am	Mr. Brad Kucharo	For Doctors Only — Tips for Achieving Financial Independence
C8	8:30 – 11:00 am	Dr. Bob Waugh	Systems for Success in Clinical Orthodontic Practice <i>Sponsored by Smile Doctors</i>
	9:15 am – 9:45 am	Refreshment Break	Complimentary, in the Exhibit area
	11:00 am – 12:00 pm	Box Lunch	Saturday Box Lunch, available for purchase
B4	11:30 am – 12:30 pm	SCAO Business Meeting	For South Carolina Association of Orthodontists Members Only
C9	12:00 pm – 2:00 pm	Dr. Heather Hopkins	What is your Aligner Prescription
C10	12:00 pm – 2:00 pm	Dr. David Ostreicher	Sagittal First: A New Standard in Orthodontic Care, <i>Sponsored by Henry Schein Orthodontics</i>
PM6	12:00 pm – 2:00 pm	Dr. Eric Ploumis	Changing Times, Changing Paradigms: Emerging Trends in Practice Opportunities and Structures
	2:00 pm – 6:00 pm	Craft City Social	College Football Watch Party, <i>Sponsored by Smile Doctors</i>

*extra fee

SAO Schedule & Session Descriptions

Thursday, October 7

Actionable Tips for Ensuring Your Practice is Highly Visible Online *Sponsored by Sesame*

Adam Bozeman | 9:00 am – 10:00 am | 1 CEU | DT1

Excellent online visibility is increasingly crucial for building a successful practice. Now, more than ever, a practice's online presence plays a crucial role in attracting new patients. In this webinar, Sesame Account Manager Adam Bozeman will cover crucial search engine optimization (SEO), pay per click and social media best practices for ensuring your practice separates itself from competitors. Areas of focus will include current components of the daunting Google Algorithm and how to exponentially expand your reach on social media. Learning objectives:

- Understand the difference between how Google looks at your website and how patients do.
- Learn the 3 key differences between Google ads and Social Media ads.
- Explore the concepts of the Google Algorithm.

Top Website Trends for 2022:

What Your Website Needs to be Effective in the Coming Year *Sponsored by Sesame*

Jaime Couden | 10:00 am – 11:00 am | 1 CEU | DT2

Much like fashion, web design is constantly changing with trends and fads coming and going, so we will be getting you caught up on the latest and greatest trends. We will be talking about getting your practice found, and once it's found, how to get patients to choose YOU. We will also learn about SEO and I will give you some tips & tricks on how to make it effective. I will be going through the most important things you need on your website to get patients picking up the phone. Learning objectives:

- Identify the top 20 features a website must have to be effective in 2022.
- Understand SEO and why it is important.
- Learn to self-evaluate your website against the top trends.

2021 SAO GOLF TOURNAMENT

Thursday, October 7 at 7:30 am
Sponsored by Ormco & Spark

Join us at Springfield Golf Club for our annual golf tournament. The \$100 fee includes: greens fees, golf cart, boxed lunch, drink tickets and transportation from & to hotel.

Club rentals are available for an additional fee.

Ormco™

SPARK™
CLEAR ALIGNER SYSTEM

What's Happening with Orthodontic DSOs *Sponsored by the McGill & Hill Group*

Wade Coleman & Jonathan Martin

11:00 am – 12:00 pm | 1 CEU | PM1

During this presentation you will learn our latest take on corporate dentistry (DSOs), practice valuation trends, how the impact of COVID-19 and potential new tax hikes should affect your planning, plus much more. We'll help you through this process, with straightforward, truthful, and fact-based answers to all of your questions. A few of the questions they address include:

- What is the current market for orthodontic DSOs?
- How did COVID-19 affect DSOs and what do we expect in 2021 and beyond?
- How will potential tax increases affect your transition planning?
- What are the financial pitfalls of selling to a DSO?
- How do you know whether or not to consider selling to a DSO?
- What should you do about unsolicited offers from DSOs and brokers urging you to sell?

Thursday, October 7

The Patient Journey *Sponsored by Sesame*

Jaime Couden | 11:00 am – 12:00 pm | 1 CEU | DT3

Nowadays, it takes more than just having a great practice website. When a potential patient uncovers an orthodontic need, they turn to the internet for their research. They want trustworthy, educational information before they make a decision on selecting a doctor. Jaime Couden of Sesame Communications will walk you through a patient's journey to find a new orthodontist and will arm you with the necessary tools to establish your online brand and provide an accurate view of your practice to prospective patients before they set foot in your lobby. Learning objectives:

- Understand how patients search for a new orthodontist.
- Implement the right SEO, Social and Paid Advertisement strategies.
- Develop the value of your online presence.

Navigating Legal Issues for the Modern Orthodontic Practice

Sean Murphy | 1:00 pm – 2:30 pm | 1.5 CEU | PM2

This course will discuss some of the common legal issues currently facing orthodontic practices, including options for dealing with: parents' questions about COVID-19, patients requesting treatment refunds, how to handle negative online reviews, and how to negotiate with third-parties contracting with your orthodontic practice. The format for the course, which includes real world hypotheticals, is meant to be both entertaining and engaging. Learning objectives:

- How to navigate certain legal issues impacting your practice.
- Options for handling difficult patients and negative online reviews.
- Gain better understanding of how to deal with contractors and third-parties (marketing firms, tech companies, etc.) working with or for orthodontic practices.

BRIUS®: The Third Way to Move Teeth

Sponsored by Brius

Dr. Mehdi Peikar | 10:00 am – 12:00 pm | C11

The superior biomechanics of BRIUS® deliver great clinical outcomes. Learn about BRIUS, a frictionless technology that combines the benefits of fixed braces and esthetic aligners to deliver an improved experience without compromise. In this lecture, we will explore the unique benefits of independent tooth movement biomechanics with BRIUS. Learning objectives:

- Why are the biomechanics of BRIUS superior to aligners or braces?
- Why does BRIUS reduce treatment time by as much as 55%?
- What types of malocclusions can be treated with BRIUS?

100th Anniversary Opening Ceremony

SAO Leadership & Keynote Speaker Thomas Dismukes
3:00 pm – 4:30 pm | 0 CEU

Gather in the ballroom for an exciting and inspirational 100th Anniversary Opening Ceremony. We'll recognize and celebrate our peers who have served our association, and hear from best-selling author Thomas Dismukes — a motivational storyteller, humorist and adventurer. Read more about our keynote speaker on page 2.

Happy Hour with Our Exhibitors

4:30 pm – 7:30 pm | 0 CEU

Join us in the exhibit hall for happy hour snacks and two drink tickets per person. Happy hours are extended to give members and exhibitors more time to socialize, now that we can meet in person again!

Resident Happy Hour

6:30 pm – 7:30 pm | 0 CEU

Residents are invited to attend an exclusive event where you can network with your peers! Two drink tickets per resident.

Friday, October 8

A Contemporary Review of Predictable Mechanics: Deep Bite and Class III Correction with Invisalign

Dr. Mazyar Moshiri | 8:00 am – 11:00 am
2.5 CEU | C2

Invisalign has made an indelible mark on our profession. Yet, the appliance remains nuanced for many orthodontists seeking predictable outcomes. Join us for a review of some important biomechanical and diagnostic consideration to help specifically improve your outcomes for deep bite and class III malocclusions. After this lecture, you will have:

- An improved understanding of important diagnostic and biomechanical considerations associated with predictable clear aligner outcomes.
- Improved knowledge on how to set up a digital treatment plan to address deep bite malocclusions.
- Improved knowledge how improve predictability of the treatment of class III malocclusions with Invisalign.

Lightforce 3D Printed Braces: The Next Generation of Fully Customized Braces

Dr. Clark Colville | 8:00 am – 9:15 am
1.25 CEU | C3

Digital treatment planning has become increasingly prevalent in the orthodontic specialty. Indirect bonding has long been recognized as a superior technique to provide optimal bracket placement. The evolution of 3D printing has now provided the newest method to combine both to produce a fully customized straight-wire appliance that can be bonded in a highly accurate manner. From digital planning to ideal bracket placement, the orthodontist has an efficient system to provide outstanding clinical results with Lightforce Orthodontics 3D printed brackets. Achieve outstanding results with the only fully customized bracket system in the orthodontic market today. Learning Objectives:

- See how a fully customized bracket system can be manufactured for every patient.
- Learn how to indirect bond using the Lightforce system.
- Appreciate how treatment times can be optimized with digital setups and fully customized brackets.

“Up Your Service” Customer Service Skills For the Dental Team

Debra Engelhardt-Nash | 8:00 am – 4:00 pm
6 CEU | DT4

The dental team has great influence in the way patients perceive the quality of care being provided. The way patients are treated is a defining moment in how they feel about the doctor, their treatment and the way the practice operates. They validate (or invalidate) the patients’ decision they have chosen the right office. This program will explore how the Dental Team can improve customer service skills and communication effectiveness to increase treatment acceptance, patient satisfaction and practice growth. Learn how to be more intentional in creating an exceptional experience from the initial encounter to treatment inception. Learning Objectives:

- The importance of the first 7-10 seconds and the difference it can make.
- How to introduce office protocols that gains understanding and acceptance.
- The impact of body language, tone of voice, and language skills at every patient encounter.

Marketing in the Digital Space and Changes That Would Benefit Offices Post COVID

Timothy Donoghue | 9:45 am – 11:00 am
1.25 CEU | PM3

COVID-19 rattled many industries and demanded rapid changes to our historically stable ways of working — particularly surrounding how we market practices digitally. Let’s unpack the challenges we observed, winning strategies executed, and the pieces we at TIO believe are here to stay regardless. Expect to walk away with actionable steps that the top-performing members of the progressive TIO network used to thrive during & in the post-COVID landscape.

General Assembly Meeting of the SAO

11 am – 12:00 pm | 0 CEUs | B2

VAO Business Meeting

12:00 pm – 1:00 pm | 0 CEUs | B3



Boxed Lunches & Refreshment Breaks

NEW THIS YEAR ... Complimentary refreshments will be available in the exhibit area during break times between sessions. This will give extra time for networking and make sure you have everything you need to get through your day, since dining options within walking distance of our host hotel are limited. You can pre-purchase boxed lunches in advance and dine with your exhibitor colleagues. *Boxed lunch is \$35 per attendee. Each day features a different sandwich or wrap plus whole fruit, chips, cookie and a bottled water.*

Friday, October 8

The Virtual Lifestyle *Sponsored by Spark*

Dr. John Warford | 1:00 pm – 2:15 pm | 1.5 CEU | C1

This 1.5 hour experience will inspire if you are looking for a different path forward in and outside of your business. Learn more about dramatic increases in treatment efficiency, and how technology integration is helping the orthodontic community to treat more patients in less time with fewer in-office visits. As a Top Spark Aligner and Dental Monitoring user, Dr. Warford will share his experience with what a practice metamorphosis looks like and how it can change everything. Learning Objectives:

- Optimizing patient appointment sequencing for maximum efficiency utilizing Spark Aligners and Dental Monitoring.
- How to best utilizing clinical team members in a virtual journey.
- Treatment design and protocols for all case complexities with aligners.
- Maximizing the patient experience through convenience.

The 4 C's of Tomorrow's Clear Aligner Therapy

Dr. Eric Wu | 1:15 pm – 2:15 pm | 1 CEU | C5

Learn how in-office systems like digital workflow and same day aligners can increase efficiency and provide better outcomes for your patients. Understand the 4 C's of future Clear Aligner Therapy (Control, Choice, Convenience, Cosmetic Based). Learn about uLab's technology and how you can implement it in your practice.

Maximizing Success Treating Growing Patients with Invisalign

Dr. Regina L. Blevins | 1:00 pm – 4:00 pm
2.5 CEU | C4

Join Dr. Regina Blevins as she shares her experience in treating growing patients with Invisalign clear aligners. She will cover Invisalign First, Invisalign with Mandibular Advancement and more complex

cases in teens. She will share her strategies for treatment timing, ClinCheck treatment plan set ups and case management during treatment. Learning Objectives:

- Treatment timing, how to decide if the time is right to intervene, and how to stage treatment.
- Setting up a ClinCheck treatment plan that has a greater predictability of success.
- How it incorporates virtual appointments and virtual treatment monitoring into your routine.

Dental Monitoring and Virtual Orthodontics

Dr. John Warford | 2:45 pm – 4:00 pm
1.25 CEU | C6

Dr. Warford believes that many people have a smile that is limiting their potential, and after having their smile transformed into one that they are proud of, can then become all they were meant to be. He and his Team are the leading provider of clear aligner treatment from Minneapolis to Seattle and is a Top 20 User of Dental Monitoring in the US and the top Spark provider in North America. He believes that the dynamic achieved when the art, science, and experience of an orthodontist are combined with the enhanced capabilities of digital technology results in a potent combination resulting in more efficient and effective treatment experiences and better outcomes for both the patient and Ortho Team alike. Learning Objectives:

- Effectiveness of virtual orthodontics.
- The multiple impacts dental monitoring has on every aspect of a practice.
- Decreased chairtime = more leverage to choose the lifestyle design of the doctor.

Happy Hour with Our Exhibitors

4:00 pm – 6:00 pm | 0 CEU

Transition from day into your evening in Charlotte with a "pit stop" for happy hour in the exhibit hall with snacks and two drink tickets per person.

SAO Schedule & Session Descriptions



2021 Southern Celebration at the NASCAR Hall of Fame

Friday, October 8, from 7:00 – 10:00 pm • Sponsored by Sesame

Charlotte is home to the NASCAR Hall of Fame, a not-to-miss destination featuring interactive exhibits and racing opportunities. Bring your whole team for dinner, drinks and a night to remember when we take over the museum for our 100th Anniversary party of the century!

Adult Ticket: \$85 Child Ticket: \$65



CDABO Prep Course • Saturday, October 9

1:00 PM - 4:30 PM | 3 CEU | Separate Registration. Visit <https://conta.cc/3eHI8Ht>

The College (CDABO) is pleased to offer a preparatory course for individuals interested in taking the American Board of Orthodontics (ABO) Scenario-based Clinical Examination to achieve board certification. The course outline will consist of an overview of the ABO virtual examination format and how to prepare. This is a three hour course (with a break) to assist attendees in preparing for the new exam format. Participants will receive 3 CE credits for their participation. Space is limited, assigned on a first-come basis. This is a separate registration from SAO's annual meeting. Please visit <https://conta.cc/3eHI8Ht>

Saturday, October 9

Efficient Class 2 Correction with Invisalign

Dr. Scott Frey | 8:00 am – 11:00 am | 2.5 CEU | C7

Learning Objectives:

- Examination of Class 2 Treatment Mechanics
- Efficient Class 2 Treatment with Invisalign & Invisalign with Mandibular Advancement
- Applying Soft Tissue Driven Treatment Principles for Class 2 Correction

Speaking Financially

Debra Engelhardt-Nash | 8:00 am – 11:00 am
2.5 CEU | PM4

More treatment is lost during financial arrangements than any other place in the office. In a perfect world, all patients would choose your treatment 100% of the time and have the financial resources to do so. It sounds so simple. But is it? There are times when treatment is delayed or denied due to the financial constraints of the patient. This workshop will review solutions to create win/win solutions — for the patients and the practice. Learning Objectives:

- How and when to discuss financial arrangements — creating the right atmosphere.
- How to introduce financial resources.
- Enhance treatment presentation skills.

Tips for Achieving Financial Independence

Sponsored by the McGill & Hill Group

Brad Kucharo | 8:00 am – 9:15 am | 1.25 CEU | PM5

FOR DOCTORS ONLY. Just a small percentage of dentists can actually afford to retire at age 65 and maintain their current standard of living. Discover the financial tips you should consider implementing to build your net worth and reach financial freedom. Learning Objectives:

- Developing a personalized financial and savings game plan.
- Understanding the major financial obstacles most doctors face.
- Review of the latest tax updates.

Systems for Success in Clinical Orthodontic Practice

Dr. Bob Waugh | 8:30 am – 11:00 am
2 CEU | C8

This presentation looks at proven strategies that can be applied to every orthodontic practice to achieve more efficient clinical results. With a focus on aesthetics and enhanced efficiency, attendees will learn about how to predictably reduce decalcification rates. The course also teaches a novel way to communicate with referring dental professionals and our mutual patients. Dr. Waugh will discuss how and why to photograph every patient at every visit for monitoring treatment progress. Finally, a screening tool for children with airway problems will be presented along with a look at a more efficient archform selection rationale based on tooth size.

SCAO Business Meeting

11:30 am – 12:30 pm | 0 CEUs | B4

What is your Aligner Prescription?

Dr. Heather Hopkins | 12:00 pm – 2:00 pm
2 CEU | C9

Most of us use the same prescription with a few variations to treat all of our patients. What are the limitations of treating all of your patients with a handful of bracket prescriptions? How much of your day is spent customizing brackets for your patients. Whatever the answer, your clinical team probably spends even more time waiting for you to do these customizations chairside. What if you could treat every single patient with a custom prescription? How could this improve efficiency and outcomes? In this lecture, you will learn how to apply Tweed mechanics to your 0-0-0 aligner set-ups. Learn the differences in mechanics between brackets and wires.

Learning Objectives:

- How to avoid common side effects from improper mechanics with aligners.
- How aligners and other custom treatment options can improve efficiencies and clinical outcomes.
- Recognize what amount of first, second, and third order forces to apply to your case set-ups.

SAO Schedule & Session Descriptions

Saturday, October 9

Sagittal First: A New Standard in Orthodontic Care *Sponsored by Henry Schein Orthodontics*

Dr. David Ostreicher | 12:00 pm – 2:00 pm
2 CEU | C10

Elevate your quality of clinical outcomes using the newest technologies, while exceeding your patients' expectations with shorter treatment times, fewer appointments, and predictability. Dr. David Ostreicher will share a range of clinical case types, including more comprehensive, challenging Class II and Class III cases that can be simplified through Sagittal First protocol with clear aligners or braces.

Dr. Ostreicher will demonstrate how to increase predictability and efficiencies, decrease chair-time, and differentiate your practice through Minimum Touch solutions, with remarkable clinical excellence. His clinical results will challenge your views on the traditional practice workflow, while demonstrating how to create long-term aesthetics results with minimal extractions. Learning Objectives:

- Demonstrate the mechanics and clinical applications of Sagittal First treatment approach, including simplifying complex and severe Class II and Class III malocclusions.
- Access the benefits of Minimum Touch Orthodontics, including shorter and fewer appointments, with dramatically decreased treatment times.
- Share methods to easily integrate Sagittal First into your practice.



Marshall Park, across from hotel

Changing Times, Changing Paradigms: Emerging Trends in Practice Opportunities and Structures

Dr. Eric J. Ploumis | 12:00 pm – 2:00 pm
2 CEU | PM6

Market forces have radically altered the way we run our practices. Excessive student loan debt, increased competition from non-specialists, an uncertain economy, and the encroachment of corporate dentistry have put pressure on both the junior and senior orthodontist. This lecture will examine those market forces from a legal and economic standpoint and help us understand, address, and adapt to these changing paradigms. Dr. Ploumis is an attorney, an orthodontist, and an associate clinical professor of orthodontics at New York University and Wyckoff Heights Hospital in Brooklyn. He maintains a practice in orthodontics and in law in New York City.



Craft City Social Game Day Party

Saturday, October 9, 2:00 pm–6:00 pm • Sponsored by Smile Doctors

Sport your game day colors and join us for an afternoon of football and fun! Craft City Social will be open exclusively for SAO guests on Saturday afternoon. This energetic and engaging social hub bridges the gap between outdoor pool-scape and indoor adult playground. Though it will be too chilly to swim, we can socialize in the fall sunshine at the poolside cabanas and enjoy lots of games including: billiards, darts, foosball, life-sized Jenga and shuffleboard.





Dr. Regina L. Blevins

Dr. Blevins started her career in dentistry in 1980 as a Dental hygiene graduate of C.S. Mott Community college. She attended the University of Michigan where she received her degree in Dentistry in 1987. Her appreciation and love for the fine art of the cosmetic side of dentistry

led her to pursue her orthodontic graduate training at the University of Minnesota, where she received her certificate in orthodontics and Master of Science Degree in 1991. Dr. Blevins enjoys staying up to date on the latest developments in orthodontics by maintaining a rigorous continuing education schedule. Her professional memberships, awards, and associations include: American Association of Orthodontists, American Dental Association, Dakota County Study Club, St. Paul District Dental Society, Minnesota Association of Orthodontists (2013-2014 vice president), Minnesota Association of Orthodontists (2014-2015 president), #1 Invisalign Provider in Minnesota and #1 provider of Teen treatment worldwide, Invisalign Provider–Diamond Plus Status, 10,000+ historical cases, Align Tech Faculty member and was awarded Master Faculty status in 2018, International Lecturer on clear aligner techniques. When she is out of the office, Dr. Blevins enjoys spending time with her husband Tom and their four children, Noah, Rachel, Lucy, and Will.



Adam Bozeman

Adam has been working in the Dental industry for over 7 years, specifically in roles geared towards equipment and technology. He holds a passion for helping his customers build highly efficient and marketable practices. Adam is an Account Manager at Sesame Communications helping his

members better manage their total online presence. He holds a bachelor's degree in Marketing and is currently working towards his MBA. Adam resides in San Francisco with his fiancé where they enjoy surfing, hiking, and the not-so-occasional donut.



Wade Colemn

Wade joined McGill & Hill Group in October of 2012. He earned a bachelor's degree in accounting from The Citadel, and a Juris Doctorate degree from Charlotte School of Law. Wade serves clients across the United States in the development and implementation of customized

transition plans for their dental practices. He is a member of the South Carolina Bar and American Bar Associations.



Dr. Clark D. Colville

Dr. Clark D. Colville is a 1993 graduate from the orthodontic program of the University of Texas Health Science Center at Houston and maintains private practices in Seguin and San Marcos, Texas. Dr. Colville is a Diplomate of the American Board of Orthodontics and is active in the American

Association of Orthodontists. Dr. Colville is an associate clinical professor in the graduate orthodontic department at the University of Texas Health Science Center Houston School of Dentistry where his primary responsibility is teaching clear aligner treatment to orthodontic residents. He is a well-known speaker throughout the US and internationally on clear aligner treatment – with a specific focus on digital treatment planning.



Jaime Couden

Jaime Couden has been working in the digital marketing world, specifically in the Dental industry, for over 13 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!)

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Jaime is a Seattle native and graduated with a political communications degree and an EMBA degree from the University of Washington. When she's not out helping doctors, she is traveling the world, at a football game or spending time with Bear and Moose, her black labs.



Timothy Donoghue

Australian-born, and UK-based, Tim is the COO of The Invisible Orthodontist and led the charge on strategizing how to navigate the impacts of COVID on the TIO network in 5 different countries. Prior to TIO, Tim held the position of Managing Director for an international performance

marketing agency, spanning advertising in over 8 countries. His passion is the humanization of data and translating this data-led approach into creative ways of reaching new customers in an ever-changing landscape.



Debra Engelhardt-Nash

Debra Engelhardt-Nash has been in dentistry since the early 80's and a speaker/consultant for over 30 years. She has presented workshops nationally and internationally for numerous study groups and organizations and has written for a number of dental publications. She has been

honored twice as author of the year for her contributions to dental journals. Debra has also presented several virtual programs for dental organizations and dental Teams and been the featured speaker for podcasts and webinars. Debra is a founding member and served three terms as President of the National Academy of Dental Management Consultants and is the first recipient of the Charles Kidd Meritorious Service Award presented by the ADMC. She is also on the board of the American Academy of Dental Practice and Speaking Consulting Network. Debra has been listed as one of the top 25 Women in Dentistry and is the 2015 recipient of the Gordon Christensen Outstanding Lecturer Award.



Dr. Scott Frey

Scott Frey, DDS, MSD is a graduate of the University of the Pacific Arthur A. Dugoni School of Dentistry and earned his post-doctoral master's degree and certificate in orthodontics from the University of Colorado. He is board certified in orthodontics practicing in Norfolk, VA., a

published scientific author, and an international authority and lecturer on esthetic orthodontics. He earned fellowships from the World Congress of Minimally Invasive Dentistry and the American Academy of Facial Esthetics. Dr. Frey has held a faculty position at the University of the Pacific teaching dental esthetics and occlusion. He developed the Soft Tissue Orthodontics Curriculum for Henry Schein. Dr. Frey is a reviewer for the Journal of Aesthetic Plastic Surgery, Journal of Cosmetic Dermatology, the Angle Orthodontist, founder of theorthocosmos.com, and is an international authority on esthetic and digital orthodontics. Dr. Frey is passionate about teaching and is frequently invited to lecture to orthodontists around the world on behalf of Invisalign, Henry Schein Orthodontics, the American Academy of Facial Esthetics, and numerous orthodontic associations. He has been extensively published as a scientific author and is responsible for developing the treatment paradigms of Orthosculpture® and Soft Tissue Orthodontics®.



Dr. Heather Hopkins

Dr. Heather Hopkins is a partner in an ortho, pedo, GP practice in Columbia, SC. Dr. Hopkins attended the University of Kentucky for dental school, and the University of Louisville for her orthodontic residency. She is a pioneer when it comes to utilizing technology to

deliver custom orthodontic care in her practice. As a busy mom, wife, practice owner, and passionate educator, Dr. Hopkins values efficiency and effectiveness. She understands the struggle to maintain a good work/life balance. This struggle is what led Dr. Hopkins reinvent her practice. Determined not to sacrifice quality in the pursuit

continued next page

of efficiency, she built a digital practice model that has allowed her to scale her practice without scaling up her stress. Currently, Dr. Hopkins uses 100% custom digital orthodontic therapy for her patients. She offers Invisalign aligners, in-house aligners, and digital indirect bonding.



Brad A. Kucharo

Brad joined McGill & Hill Group in November 2007. He graduated from the University of Iowa and holds both a Bachelor of Business Administration degree and Master of Accountancy degree. Brad obtained his Certified Public Accountant certificate in 2007 and his Certified Financial

Planner™ certificate in 2008. He formerly worked at Price Water House Coopers, LLP in the Personal Financial Services Group performing tax and financial planning services for high net-worth individuals. He is a member of the American Institute of Certified Public Accountants and the North Carolina Association of Certified Public Accountants.



Dr. David Ostreicher

Dr. David Ostreicher graduated from Clark University and attended Columbia University School of Dental Medicine, where he received his dental degree and certificate of specialty in orthodontics. After dental school, he continued his education and earned a Master of Science in nutrition and a

master's in public health from Columbia. He is professor emeritus at Columbia University and the University of New Haven. He is a member of the American Dental Association, American Association of Orthodontists, American Public Health Association, and the Honorary Dental Society (OKU). After serving many years on the board of directors of the Nassau County Dental Society, he became president of the New York State Dental Association. Dr. Ostreicher has published dozens of articles on dentistry and health, served as editor of *For Dentists Only*, a scientific dental journal, and he is also a speaker for the National Bone Health Alliance.



Jonathan Martin

Jonathan joined McGill & Hill Group in September of 2005. He earned bachelor's degrees in both accounting and finance, and a Master of Accountancy degree from the University of North Carolina at Charlotte. Jonathan works with dentists and dental specialists across the United States assisting

them with their transition needs, and speaks regularly at dental schools and study clubs. He is a member of the American Institute of Certified Public Accountants and the North Carolina Association of Certified Public Accountants.



Dr. Mazyar Moshiri

Dr. Maz Moshiri is in private practice in St. Louis, MO. He is the co-founder of the Aligner Intensive Fellowship, an online residency that has educated thousands of doctors worldwide on the proper treatment planning and use of clear aligners. Currently, he is a Clinical Assistant Professor

in the orthodontic residency program at the Center for Advanced Dental Education at Saint Louis University. He manages the clear aligner curriculum and provides lectures on Invisalign. He is a Diplomate of the American Board of Orthodontics as well as a Fellow of the American College of Dentists, the International College of Dentists, and the Pierre Fauchard Academy.



Sean Murphy

Sean Murphy currently serves as the Executive Director and General Counsel for the Arizona Dental Association (AzDA). In this role, Sean works with the AzDA team to provide advocacy, continuing education, and valuable benefits to Arizona dentists and dental specialists.

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Prior to joining AzDA, Sean worked for the American Association of Orthodontists (AAO) and brings with him a wealth of association and advocacy experience. At the AAO, Sean's responsibilities included managing the AAO's legal and advocacy department, overseeing the AAO's regulatory and legislative priorities, administering the AAO's state Component Legal Support Fund, assisting with AAO governance, and handling the AAO's legal issues. Sean has also lectured throughout North America on various dental topics, many involving the business and legal aspect of running a practice.



Dr. Mehdi Peikar

Dr. Peikar is an orthodontist, physicist, and inventor of BRIUS®. He received a master's degree in condensed matter and quantum mechanics from the Physics Department at the University of Illinois at Urbana-Champaign. Dr. Peikar completed his Ph.D. in Biomechanics and Biophysics at Johns Hopkins School of

Medicine Biophysics Department. He did his three-year residency in the orthodontics at UCLA.



Dr. Eric J. Ploumis

Dr. Ploumis is an attorney, an orthodontist, and an associate clinical professor of orthodontics at New York University and Wyckoff Heights Hospital in Brooklyn. He maintains a practice in orthodontics and in law in New York City.



Dr. John Warford

Dr. Warford is a dental graduate from the University of Minnesota (2001) and ortho from University of Missouri, Kansas City (2003). He is the owner of Warford Orthodontics in Bismarck, ND, which was started by his father in 1973. He is married to Beth, a former nurse and current entrepreneur, and has four daughters.



Dr. Bob Waugh

Dr. Waugh has never hesitated to embrace new technologies and protocols if they improve the quality of patient care and oral health. His patients' oral hygiene quality scores are twice the national average, just one testament to the efficacy of the systems he and his

team use. Now becoming board certified in dental sleep medicine just five years ago, he has integrated a practice treating sleep apnea with oral appliances and continues to advance his skills in creating better airways for his young patients. Dr. Waugh graduated from the Medical College of Georgia School of Dentistry with both a D.M.D. and a M.S. in Oral Biology and from Baylor College of Dentistry earning a certificate of specialization in Orthodontics. He is a diplomate of the American Board of Orthodontics and a member of the American College of Dentists and the International College of Dentists. Dr. Waugh has practiced in Athens since 1989 and enjoys teaching as an Associate Professor in Orthodontics at Augusta University's Orthodontic Program.



Dr. Eric Wu

Dr. Wu is a Silicon Valley native and has been practicing in the San Francisco Bay Area for over 13 years. Dr. Wu is best known for his state of the art treatment and keeping up with the latest innovations in digital orthodontics. He is an active participant and contributor for several online study groups and orthodontic societies including

the Pitts Progressive Study Group. Dr. Wu serves as both a clinical advisor and key opinion leader for uLab systems. He also serves as a key opinion leader for both OC Orthodontics and Structo 3D. When he isn't practicing, Dr. Wu enjoys teaching at both University of Nevada, Las Vegas and Roseman University in Henderson, NV. He also teaches at the Dental Assisting Program at Foothill Community College. Dr. Wu has two beautiful children with his wife Lisa.

Register online at saortho.org ... Fast & Easy!

It's fast and easy to register online. Use this form to gather the information you will need to register the doctor and team. If you prefer, you can fill out this form and submit it by fax (844) 214-1224, or mail to: 32 Lenox Pointe NE, Atlanta, GA 30324. Please use one form per doctor and remember to retain a copy for your records. The SAO is only responsible for materials received.

Doctor's Name/Primary Registrant (Please print): _____

Nickname for Badge: _____ Lecture Codes (pg. 4): _____

Business Address: _____

City: _____ State: _____ Zip: _____ Country: _____

Business Phone: _____ Email (Required*): _____

*Confirmation will be sent via e-mail only, but is not shared.

Additional Registrants: First & Last Names, Indicate if (T) Team, (S) Spouse, (F) Family/Guest – Plus Lecture Codes (pg 4):

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Note dietary restrictions or disabilities with registrant's name so we can plan accordingly:

Everyone at the SAO Annual Meeting must be registered and wear a badge

Member Types & Fees	Early Bird By Aug 6	Aug 7 — Sept 7	Late After Sept 7	Total
AAO, SAO, WFO Member	\$359	\$389	\$419	
New & Young Member <i>(Graduated Residency on or after October 1, 2016)</i>	\$0	\$0	\$160	
Full-time Educator	\$0	\$0	\$50	
Resident/Student	\$0	\$0	\$50	
First-time Attendee, Active Member	\$175	\$195	\$215	
Retired Member	\$175	\$195	\$215	
Non-Member of the AAO, SAO, WFO	\$800	\$900	\$1,000	
Day Pass for SCAO Member (Saturday Only)	\$0	\$0	\$50	
Additional Registration Types				
Active Member's Team	\$259	\$289	\$319	x _____ =
Member's Spouse (Requesting CE credit)	\$100	\$130	\$160	
Member's Spouse (No CE credit)	\$0	\$0	\$50	
Family or Guest(s) age 12+	\$50	\$50	\$100	x _____ =
Family or Guest(s) age 0-12	\$0	\$0	\$0	x _____ =

See Next Page to Select Optional Event Tickets

SUBTOTAL

Tickets for Complimentary & Special Events

Help us plan for catering and hotel staff during complimentary breaks and happy hours, as the association must pay for all food and drink ordered. Fees for activities and lunches can be refunded until Sept. 10.

Special Events, Meals & Breaks	Fee	#Tickets	Total
Thursday Golf Tournament	\$100		
Thursday Boxed Lunch with the Exhibitors	\$35		
Thursday Afternoon Refreshment Break	Complimentary		
Thursday Happy Hour in the Exhibit Hall	Complimentary		
Resident Happy Hour	Complimentary		
CDABO Breakfast	\$45		
Friday Morning Refreshment Break	Complimentary		
Friday Boxed Lunch with the Exhibitors	\$35		
Friday Afternoon Refreshment Break	Complimentary		
Friday Happy Hour in the Exhibit Hall	Complimentary		
NASCAR / Southern Celebration – Adult, 12 & over	\$85		
NASCAR / Southern Celebration – Kids 12 & under	\$65		
Saturday Morning Refreshment Break	Complimentary		
Saturday Lunch with the Exhibitors	\$45		
Craft City Social Football Watch Party	Complimentary		
		Subtotal	
		Subtotal from previous page	
		TOTAL*	

Payment Information:

It's easy to register online at saortho.org with the information gathered here. Or, mail form with check payable to Southern Association Orthodontists.

Card Number: _____

Exp. Date: _____ CVV Code: _____

Billing Zip Code: _____ Signature: _____

* Lodging not included. Link for hotel at group rate will be sent in your registration confirmation email.

Annual Session Disclaimer:

In consideration of being allowed to participate in ticketed and complimentary events associated with the SAO Annual Meeting, the Southern Association of Orthodontists (SAO) and its authorized agents are hereby released from any damages caused or incurred in connection with these activities. The SAO does not review, approve of, or necessarily agree with, the topics, speakers and presentations set forth in this program. As such, by virtue of your attendance at this program, you acknowledge that any and all actions taken by you based upon such topics, speakers and presentations are undertaken by you at your own risk, and you further agree to hold the SAO and its authorized agents harmless from any and all liability in relation to the same, including attorney's fees, arising from, or in connection with, these activities. The SAO encourages you to make your own independent judgment as to the topics, speakers, and presentations, and to rely on the advice of professionals, as appropriate, in making decisions in relation thereto. By completing this registration, I grant permission to all of the foregoing to use any photographs, motion pictures, or any other record of my participation in this event.

Southern Association of Orthodontists • 32 Lenox Pointe NE, Atlanta, GA 30324
 Fax (844) 214-1224 • Questions (404) 261-5528 • Register online at www.saortho.org

Mark Your Calendar: Future Meeting Dates

Hilton Downtown, Austin, TX • November 3-5
Combined Constituent Meeting between SAO/SWSO/MSO

2022



2023

Omni Resort, Amelia Island, FL • October 26-28
Joint Meeting with SWSO



Rosen Shingle Creek, Orlando, FL • Sept 26-28
Joint Meeting with SWSO

2024



Southern Association of Orthodontists is an ADA CERP Recognized Provider. ADA CERP is a service of the American Dental Association to assist dental professionals in identifying quality providers of continuing dental education. ADA CERP does not approve or endorse individual courses or instructors, nor does it imply acceptance of credit hours by boards of dentistry. Southern Association of Orthodontists designates this activity for up to 19 continuing education credits. Concerns or complaints about the CE may be directed to the SAO at saoevents@saortho.org or to ADA CERP at www.ada.org/cerp.



**The Centennial
Celebration of the
Southern Association
of Orthodontists**

October 7-9, 2021
Le Méridien Hotel
Charlotte, North Carolina

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