The Physician Wellness and Financial Literacy Conference will take place March 11-14, 2020 in Las Vegas, Nevada at the Paris Las Vegas Hotel and Convention Center. This conference is aimed at attending level physicians, dentists, and others interested in reducing burnout and improving patient care by teaching techniques for managing burnout among doctors and their staff, improving the management of the practice, and increasing financial literacy. We believe that financially stable physicians are less burned out and can have longer, more meaningful careers providing better care to their patients. The three days of educational sessions include 27 hours of presentations and expert panels from physicians, financial professionals, authors and bloggers.

**REGISTRATION**

Early Bird Registration until 7/22/19: $1,199  
Standard Registration: $1,299  
Register at: whitecoatinvestor.regfox.com/pwflc20

Here is what attendees receive:
- 27 hours of presentations and expert panels, can attend up to 18 hours
- 15 hours of AMA PRA Category 1 Credits
- 15 hours of AGD PACE approved CE credit
- Free access to the conference online course to include all presentations
- Sweet swag bag to include books written by presenting authors
- Opening night reception
- A chance to mingle with other physicians interested in personal finance, wellness, investing, and business
- The opportunity to meet other members of the WCI community that you've only met virtually
- Access to some of the top minds in physician finance
PHYSICIAN WELLNESS & FINANCIAL LITERACY CONFERENCE

SCHEDULE

Thursday Morning Sessions (General)
# 1 The State of Physician Wellness: a Review of the Literature* James M. Dahle MD
# 2 Exploring the Tax Efficient Waterfall Sarah Catherine Gutierrez CFP® CRPS®
# 3 The Education of an Index Investor Rick Ferri CFA

Thursday Afternoon Sessions (Breakout)
# 4A Bridging the Intimacy Gap Between Doctors and Patients Through Shared Storytelling* Jordan Grumet MD
# 4B Panel—Recognizing and Interacting Appropriately with Financial Advisors Moderator: James M. Dahle MD; Panel Members: Steven Podnos MD MBA CFP®, Randy Gertner MD, Johanna Fox Turner CPA CFP®, Rick Ferri CFA, Sarah Catherine Gutierrez CFP® CRPS®
# 5A Sexual Health and How It Affects Patient and Physician Wellbeing* Shawni Coll DO
# 5B Building Streams of Passive Income Peter Kim MD
# 6A Physician Wellness in the Modern Medical Practice* Randy Gertner MD
# 6B Panel—Boosting Career Longevity for Women Physicians* Moderator: Bonnie Koo MD; Panelists: Disha Spath MD, Carrie Reynolds MD, Sunny Smith MD, Danette LeBaron MD

Friday Morning Sessions (General)
# 7 Recovering From Cases That Make You Cry* Fahd Ahmad MD MSCI
# 8 Tax Planning for White Coat Investors Phil Demuth PhD
# 9 The Psychology of Investing Morgan Housel--Partner, Collaborative Fund

Friday Afternoon Sessions (Breakout)
# 10A Who Owns You? What Happens to the Physician Patient Relationship When the Doctor Does Not Own the Practice* Kurt Schoppe, MD
# 10B Panel—Extreme Solutions for Burnout—Practice Part-Time or Leave Medicine Completely* Moderator: Leif Dahleen MD; Panelists: Dawn Baker MD MS, B.C. Krygowski MD, Jordan Grumet MD, Crispy Doc
# 11A Choosing Joy Over Despair: How You Can Get Fired Up in your Career instead of Burning Out* Brent Lacey MD
# 11B Student Loans: Past, Present, Future & Advanced Payoff Strategies Ben White MD
# 12A Self-Knowledge: The Key To Managing Physical and Financial Health* Dawn Baker MD MS
# 12B Panel—Investing for Retirement and College Moderator: James M. Dahle MD; Panelists: Leif Dahleen MD, Harry Sit, Paul Merriman, Phil Demuth PhD

Saturday Morning Sessions (Breakout)
# 13A Physician Burnout: Moving Beyond Resilience to Tangible Solutions* Nisha Mehta MD
# 13B Panel—Educating the Next Generation on Wellness and Financial Health* Moderator: James D. Turner MD; Panel Members: Jason Mizell MD, Fahd Ahmad MD MSCI, Jesse Richards DO, Katherine M. Hiller MD MPH, Gaurava Agarwal MD
# 14A Estate Planning—Taking Care of Those You Care About Most Daniel L. Kesten JD LLM
# 15A A burnout reduction and wellness strategy: personal financial health for the medical trainee and early career physician* Trevor J. Royce MD MS MPH
#15B How to Achieve Financial Freedom Using Direct Real Estate Investing While Working as a Physician Letizia Alto MD MA

Saturday Afternoon Sessions (General)
# 16 Protecting Your Patients and Yourself from Malpractice* James M. Dahle MD
# 17 Pay Only Your Fair Share: How to Legally Lower Your Taxes Harry Sit
# 18 How factor investing can change your financial future Paul Merriman
LOCATION

Las Vegas continues to build upon its reputation as a vibrant showcase for the extraordinary. This is the city that attracts nearly 43 million visitors a year by offering the grandest hotels, the biggest stars in entertainment, the highest caliber of award-winning chefs and master sommeliers, and, of course, the brightest lights. Drawing an influx of designers and upscale specialty boutiques, Las Vegas has become one of the premium world-class shopping destinations in the country. Las Vegas resorts also offer the most luxurious and varied spa experiences anywhere, With its 530-foot-tall replica of the Eiffel Tower, its Arc de Triomphe, and the world-class shopping along Le Boulevard, Paris Las Vegas is more than a magnificent homage to the City of Light. Its central Strip location gives you easy access to all that Las Vegas offers.

ACCOMMODATIONS

- Paris Las Vegas Hotel: $189/night plus taxes and resort fee
- Bally's Hotel: $139/night plus taxes and resort fee

CONTINUING EDUCATION CREDIT INFORMATION

Conference Objective: The objective of the conference is to address severe deficiencies noted among physicians in the medical literature of topics including burnout prevention, burnout treatment, personal finance, investing, and business knowledge. The deficiency increases burnout, decreases wellness and job satisfaction, and affects patient care.
Disclosures: Relevant financial relationships (or none) will be disclosed prior to the conference.

This activity has been planned and implemented in accordance with the accreditation requirements and policies of the Utah Medical Association through the joint providership of the UMA Foundation and The White Coat Investor. The UMA Foundation is accredited by the Utah Medical Association to provide continuing medical education for physicians. The UMA Foundation designates this live activity for a maximum of 15.0 AMA PRA Category 1 Credits™. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

This activity has been planned and implemented in accordance with the standards of the Academy of General Dentistry Program Approval for Continuing Education (PACE) through the joint program provider approval of Embrasure Space and White Coat Investor, LLC. Embrasure Space is approved for awarding FAGD/MAGD credit. AGD ID# 378539