

Presenters



Mike Prendergast, CFP®
Altfest Personal Wealth Management
Co-Director Altfest Dental Practice Group

Mike is a Director of the firm, heading one of the wealth management teams at Altfest which help clients with all aspects of their investment and personal financial planning matters. In addition, he is co-Director of the Altfest Dental Practice Group and sits on the firm's Financial Planning and Investment Committees.

Mike joined the firm in 2001 and has served in both the financial planning and investment departments. Mike received his M.B.A. from the Stern School of Business at New York University. He is a CFP® licensee who graduated from the Pace University Financial Planning program.



Steven Cadoff, CFP®, CFA, CRPS®
Altfest Personal Wealth Management
Senior Financial Advisor

Steve is a Senior Financial Advisor at Altfest Personal Wealth Management. A seasoned wealth management professional since 1999, he advises clients on all aspects of their financial lives, including investments and financial planning.

Steve worked at Morgan Stanley as a Consulting Group Analyst helping investment committees select mutual fund options and advising 401(k) plan participants. Steve also worked at UBS's Private Bank, as a Client Advisor where he recommended asset allocation and investment solutions, and developed an expertise in lending, multi-currency portfolios, bullion and option trading.

Steve holds the CFP®, Chartered Financial Analyst (CFA) and Chartered Retirement Plan Specialist (CRPS) designations. He graduated with a Bachelors of Science degree from the State University of New York at Binghamton.



Ronald Brunell, CIC
The Signature B&B Companies
Managing Principal

Ron is a Managing Principal at TSBBC. After receiving a B.A. from Plattsburgh State University College, he went on to do graduate work at Ithaca College. In 1989, he received his Certified Insurance Counselor (CIC) designation.

He has served as President of both IIA Queens and Kings Counties and the Downstate Insurance Council. Ron has also served on, and continues to serve, on various agency councils. He resides in Woodmere with his wife and two children.

Financial Planning, Investing & Risk Management to Secure a “Peace of Mind” Retirement for Dentists

The New York State Dental Association and Altfest Personal Wealth Management with special guest, The Signature B&B Companies, are teaming up to provide dentists with unique insights into planning for a “peace of mind” retirement. The topics will include:

- Constructing a risk-optimized investment portfolio
- Planning for a “peace of mind” retirement
- Optimizing workplace retirement plans
- Evaluating your personal risk outside of the dental practice

5:30 - 6:00 Registration

Please check in at Hilton front desk

6:00 - 6:45 Wealth Management for Dentists

Mike Prendergast, CFP®

Steve Cadoff, CFP®, CFA, CRPS®

6:45 - 7:30 Risk Management for Dentists

Ron Brunell, CIC

7:30 - 8:30 Reception

Refreshments will be served

There is no fee to attend this presentation

To RSVP, please contact Ran Cui at 212-406-0850 •
rcui@altfest.com