

# Dental/DSO Industry Newsletter

## Dental/DSO Industry Market Intelligence

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## CALENDAR OF EVENTS

### **ADA to retire SmileCon, sets final event for October 2025 in D.C.**

The ADA will end SmileCon after the 2025 meeting in Washington, D.C., citing post-COVID attendance challenges and rising event costs. While SmileCon received strong reviews and built a loyal base of repeat attendees, it never regained pre-pandemic participation levels. The ADA will explore other formats to fulfill its mandate for an annual scientific session.

Source: ADA News

#### **Academy of General Dentistry 2025**

JULY 9–12, 2025  
Montreal, Canada

AGD's annual scientific session allows attendees to network with colleagues, students, and dental team members in general dentistry continuing education. From advanced hands-on education to clinical and practice management lectures in an innovative one-hour lecture format, all of the CE earned at an AGD meeting can be applied to the AGD Fellowship and Mastership awards.

For more information, please click [here](#).

#### **112th NDA Convention**

JULY 10–13, 2025  
Sheraton Kansas City Hotel, Kansas

The National Dental Association's 112th convention will bring together dental professionals committed to advancing oral health equity in Black communities. The event will feature 20+ CE credits, over 50 exhibitors and extensive networking opportunities. It will also include NDA-Health NOW® community outreach on Thursday, offering care to local residents.

For more information, please click [here](#).

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## CALENDAR OF EVENTS (cont'd)

### **Southwest Dental Conference**

AUGUST 22–23, 2025

Dallas, Texas (*Registration is now open*)

The annual Southwest Dental Conference is the premier dental conference in the southwest, hosted by Dallas County Dental Society. The event features superior education and CE opportunities, exceptional speakers discussing the latest in the dental community and an Exhibit Hall featuring the most advanced dental equipment and technology. For more information, please click [here](#).

### **The Dental Festival**

AUGUST 21–23, 2025

Delray Beach, Florida

The Dental Festival seeks to revolutionize dental education and networking by providing an immersive, festival-like experience for dental professionals where it aims to foster professional growth, collaboration, and a sense of celebration within the dental industry.

For more information, please click [here](#).

### **AADOM25 Conference**

SEPTEMBER 4–6, 2025

Kalahari Resort, Round Rock, Texas

The AADOM25 Conference features over three days (counting pre-registration day) of dental office management training, networking and industry-led education. Attendees can join pre-conference workshops, keynote sessions, and hands-on learning opportunities, with CE credits available throughout. Highlights include a charity event, exhibitor networking, the WILD 20th Anniversary Bash and multiple award presentations.

For more information, please click [here](#).

### **Annual Mid-Continent Dental Conference**

SEPTEMBER 25–26, 2025

St. Louis, Missouri

MCDC features a two-day trade show along with lectures, workshops, special events, and the newest products and technology in dentistry.

For more information, please click [here](#).

### **Future of Dentistry Roundtable**

SEPTEMBER 29–30, 2025

Chicago

This event will draw both large and small DSOs, which are growing alongside thriving independent dental practices, while private equity is taking notice. There is a huge potential for dental innovation and improving patient care. The event includes 90 Elite speakers and 28 educational sessions which will discuss strategies for success and best leveraging these improvements.

For more information, please click [here](#).

### **SmileCon 2025**

OCTOBER 22–25, 2025

Walter E. Washington Convention Center, Washington, D.C.

SmileCon features continuing education courses, hands-on activities, and a bustling exhibit hall, Dental Central, open each day. Highlights include the Changemakers Celebration, Friday Night Fest, and the DC Dental Society Symposium for Licensure.

For more information, please click [here](#).

### **Greater New York Dental Meeting**

NOVEMBER 28 – DECEMBER 3, 2025

New York

The 101st Annual Greater New York Dental Meeting invites attendees to participate in one of the largest Dental Congresses in the world. At the 2024 Meeting, the conference hosted over 37,631 dental professionals, including:

Dentists – 13,470

Dental Assistants – 2,200

Dental Hygienists – 2,226

International Countries – 148

For more information, please click [here](#).



Please contact us if you would like to post information regarding our upcoming events or if you'd like to guest author an article for this newsletter.

[kdelaet@beneschlaw.com](mailto:kdelaet@beneschlaw.com)



## INDUSTRY SPOTLIGHT

### Benesch Healthcare Investigations & Compliance Team

As government scrutiny of the healthcare industry intensifies, enforcement agencies are **casting wider nets to recover funds** based on narrowly interpreted violations. This puts not only healthcare providers but also those outside of the healthcare industry at risk, especially those managing health-related data, employee records or compliance documentation.

**Benesch's Healthcare Investigations & Compliance attorneys** work behind the scenes to help clients avoid regulatory scrutiny, litigation and reputational harm before it starts. The team brings **first-hand insight into how investigations unfold** and how to resolve them quietly and effectively. We regularly represent clients in federal and state investigations involving the Anti-Kickback Statute, Stark Law, False Claims Act and other healthcare enforcement statutes. Many of our greatest successes are the ones **you've never heard about**, because we resolved them discreetly and efficiently behind the scenes, **before they could make headlines**.

Our team has handled **more than 75 investigations** involving healthcare enforcement matters. With many attorneys having served within **the very same agencies investigating our clients**, we bring a deep understanding of how cases are built and how to effectively dismantle them.

#### Capabilities:

- |  |  |   |
|--|--|---|
| <ul style="list-style-type: none"> <li>• Anti-Kickback Statute (including safe harbor regulations, case law and OIG advisory opinions)</li> <li>• Stark Law compliance</li> <li>• False Claims Act allegations, including whistleblower (qui tam) actions</li> </ul> | <ul style="list-style-type: none"> <li>• Civil and criminal government investigations</li> <li>• Internal and external compliance investigations</li> <li>• Regulatory audits</li> </ul> | <ul style="list-style-type: none"> <li>• Corporate Integrity Agreements (CIA)</li> <li>• OIG Self-Disclosure Protocol (SDP)</li> <li>• Healthcare fraud and abuse laws, including civil monetary penalties and program exclusion risks</li> </ul> |
|--|--|---|

#### Our team includes:



**Mark Silberman**, a former state and federal prosecutor in Illinois who also spent a decade as of counsel to the Illinois Department of Public Health  
[msilberman@beneschlaw.com](mailto:msilberman@beneschlaw.com) | T: 312.212.4952



**Chris Grohman**, a former federal prosecutor in Chicago with more than 25 trials under his belt  
[cgroham@beneschlaw.com](mailto:cgroham@beneschlaw.com) | T: 312.212.4943



**Vince Nardone**, a former FBI agent with experience investigating healthcare fraud  
[vnardone@beneschlaw.com](mailto:vnardone@beneschlaw.com) | T: 614.223.9326

#### DOJ and HHS have launched a new FCA Working Group task force targeting healthcare fraud.

Learn more in our client bulletin [here](#).

# KEY FINDINGS

## **Heartland Dental named top healthcare workplace as AI, growth, and policy shifts reshape DSO landscape**

### **DSO sector is seeing growth and recognition, but some providers could be facing an access crisis**

Heartland Dental was [named](#) one of Newsweek's "America's Greatest Workplaces in Healthcare" for 2025, recognizing its commitment to fostering a strong workplace culture, promoting employee satisfaction, and supporting professional development. The ranking is based on surveys from over 150,000 employees and 3.3 million company reviews. Company leadership cited the recognition as a reflection of its doctor-led model and investment in career opportunities.

The DSO sector overall is [experiencing](#) rapid growth, with the U.S. market projected to expand from \$26.9 billion in 2023 at a 16.4% annual growth rate through 2030. Key drivers include the demand for dental care, the adoption of technology, and administrative streamlining. However, looming funding threats could undermine access as Western Dental, California's largest Medi-Cal dental provider, [warns](#) it may shut down up to 50 clinics if Prop 56 tobacco tax funding is cut. The loss could reignite an access crisis in underserved areas. Some CEOs also [think](#) the sector will grow, but mostly under corporate ownership.

Meanwhile, other DSOs are making strategic moves to improve care and efficiency. GPS Dental has [adopted](#) VideaHealth's AI platform across more than 100 practices, reporting a 19% increase in per-patient production and a 32% rise in crown procedures. Align Technology also [awarded](#) research grants to 12 global university projects focused on clear aligner therapy and digital orthodontic workflows. These DSOs are leveraging technology and research to enhance clinical outcomes and operational performance.

Sources: Heartland Dental, Grand View Research, Becker's Dental + DSO, Western Dental, VideaHealth, Align Technology.

## **Oral health could be at-risk as states pull water fluoridation, citizens lack insurance**

### **Experts warn that long-terms damage to oral health may be around the corner as long-established policy is disputed**

The U.S. is [facing](#) a worsening oral health crisis, with around 72 million Americans lacking dental insurance, three times the number of people without health insurance. Medicaid cuts, inconsistent coverage and low reimbursement rates are making it harder for low-income and rural residents to access basic dental care. Dentists are reporting more severe cases, including preventable infections in children requiring intensive care. Advocates argue that cutting preventive care now will only exacerbate long-term health and financial burdens, particularly as states consider eliminating dental benefits to balance budgets.

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## KEY FINDINGS (cont'd)

A growing number of states are also banning water fluoridation, despite decades of evidence supporting its role in reducing cavities. Florida [recently](#) passed a law banning fluoride additives in municipal water, prompting backlash from dental experts who say it will lead to an increase in tooth decay. A recent [study](#) in JAMA Health Forum projects that removing fluoride could increase tooth decay by 7.5% and cost an additional \$9.8 billion over five years. The American Dental Association has called on insurers and public agencies to continue covering preventive services like fluoride treatments to avoid a spike in preventable dental issues.

Meanwhile, some states are working to improve transparency in dental insurance. Montana [became](#) the third state in 2025 to pass a dental loss ratio law, requiring insurers to report how much of their premiums go toward actual dental care. Insurers failing to meet minimum care standards may be required to issue refunds or face investigations. This effort aims to ensure better value and accountability for patients paying into dental insurance plans.

Despite these moves, structural gaps remain: Medicare still does not cover dental care, and Medicaid's adult coverage varies by state. Even among those with Medicare or Medicaid, many still [lack](#) dental benefits. With the national debate over fluoridation intensifying and federal Medicaid cuts looming, the divide in dental access is likely to deepen without policy intervention.

Sources: Time Magazine, WCTV, Becker's Dental + DSO, ADA News, Commonwealth Beacon.

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## GENERAL DENTISTRY NEWS

### **ADA: Dental records face major hurdles in integration with national research systems**

The American Dental Association (ADA) has warned that electronic dental records are challenging to align with medical data standards, which complicates their use in national research systems. In comments to the FDA, the ADA cited major differences in data collection, record-keeping, and technology use across dental practices that hinder interoperability with broader health systems. The association called for updates to health IT standards, including adopting Version 5 of the United States Core Data for Interoperability and better support for dental-specific real-world data. It also recommended incorporating its Dental Experience and Research Exchange registry into the federal Trusted Exchange Framework to ensure dentistry is included in research data-sharing initiatives.

Source: ADA News

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## GENERAL DENTISTRY NEWS (cont'd)

### **Patients want AI in dentistry to support human judgment, not replace it: study**

A multinational [study](#) led by Aarhus University found that most dental patients view AI positively, as long as it complements, rather than replaces, human decision-making. The survey, which included 2,581 patients from six countries, focused on AI in dental imaging diagnostics. Participants supported the use of AI for accuracy and speed but stressed the need for human oversight, transparency and safeguards around privacy and cost. Higher education and AI familiarity correlated with greater confidence in the technology, though also stronger support for keeping dentists in the loop.

Source: Dental Tribune

### **U.S. faces growing oral health crisis amid insurance gaps, fluoride bans, Medicaid cuts**

According to the State of [Oral Health Equity in America](#) report, roughly 72 million Americans lack dental insurance, leaving many without access to basic care, especially in low-income and rural areas. Dentists report a surge in severe cases—including children requiring ICU care for infections—as Medicaid cuts, fluoride bans and declining provider participation exacerbate the crisis. Fluoride, a proven tool in preventing cavities, is being banned in several states, despite evidence linking its removal to higher decay rates and billions in additional dental costs. Medicaid's inconsistent dental coverage and low reimbursement rates further limit access, even in states with otherwise robust safety nets. Dentists and advocates warn that cutting preventive care now will lead to higher long-term health and financial burdens nationwide.

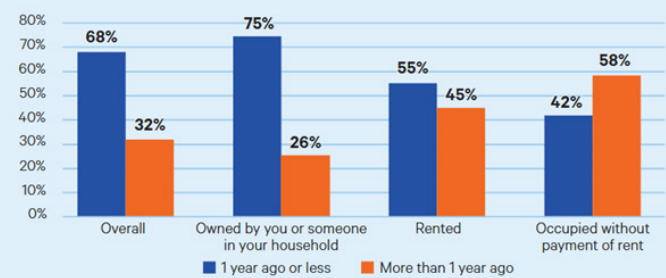
### **Dental Visits in the Past Year**



**Over two-thirds**  
of adults overall (68%) report seeing a dentist in the prior year, up slightly from 67% of adults in 2023 and 65% in 2022.

Adults who own their own homes (75%) report seeing a dentist in the prior year in higher percentages than those who rent their homes (55%) or occupy their homes without paying rent (42%).

**Time Since Last Dental Visit by Home Ownership**



Source: Time Magazine

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## GENERAL DENTISTRY NEWS (cont'd)

### **Florida Dental Association President Criticizes State Fluoride Ban**

Florida Dental Association President Dr. Jeffrey Ottley warned of long-term public health consequences following Florida's ban on adding fluoride to public water. Gov. Ron DeSantis signed the measure into law on May 15 as part of [Senate Bill 700](#), effective July 1. The bill, framed as a pro-agriculture initiative, prohibits non-water quality additives, including fluoride, in municipal water. Dr. Ottley said dentists are "extremely frustrated" and emphasized it could take years for the negative effects on oral health to become evident, and urged patients to follow dental guidance and consider fluoride supplements.

Source: WCTV

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### **Montana passes dental loss ratio law to boost dental insurance transparency**

The state passed Senate Bill 335, the Dental Insurance Transparency and Accountability Act, becoming the third state in 2025, alongside North Dakota and Washington, to enact dental loss ratio (DLR) legislation. The law requires insurers to report annually how much of patient premiums are spent on actual dental care versus administrative costs, with oversight from the state's insurance commissioner. Insurers falling below acceptable loss ratio thresholds may be investigated and required to issue refunds. The law aims to increase transparency and ensure fair value for patients receiving dental insurance.

Source: ADA News

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### **ADA Urges FTC to reform ERISA, Medicare Advantage dental rules to boost competition**

The organization submitted formal comments to the FTC calling for reform of federal policies that limit competition and consumer protection in dental care. Key targets include ERISA preemption, which removes state oversight from many employer-sponsored dental plans, and Medicare Advantage regulations that allow for opaque, inconsistent dental benefits. The ADA criticized the regulatory vacuum created by ERISA, arguing it harms transparency, pricing and provider contracting. It also urged the FTC to push for reforms to Medicare Advantage dental benefits, including standardizing disclosures and including dental in medical loss ratio calculations.

Source: ADA News

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### **Pearl secures FDA clearance for 3D dental AI platform**

Pearl's Second Opinion platform has gained FDA 510(k) clearance to analyze 3D CBCT dental images, enabling the automated identification of critical anatomical structures, such as the mandible, maxilla, dentition, sinuses, and airway. This approval expands Pearl's AI capabilities beyond 2D imaging, making it the only dental AI company with FDA-cleared software for both 2D and 3D radiologic analysis. Pearl says the approval will help improve accuracy and efficiency in dental diagnostics.

Source: Pearl

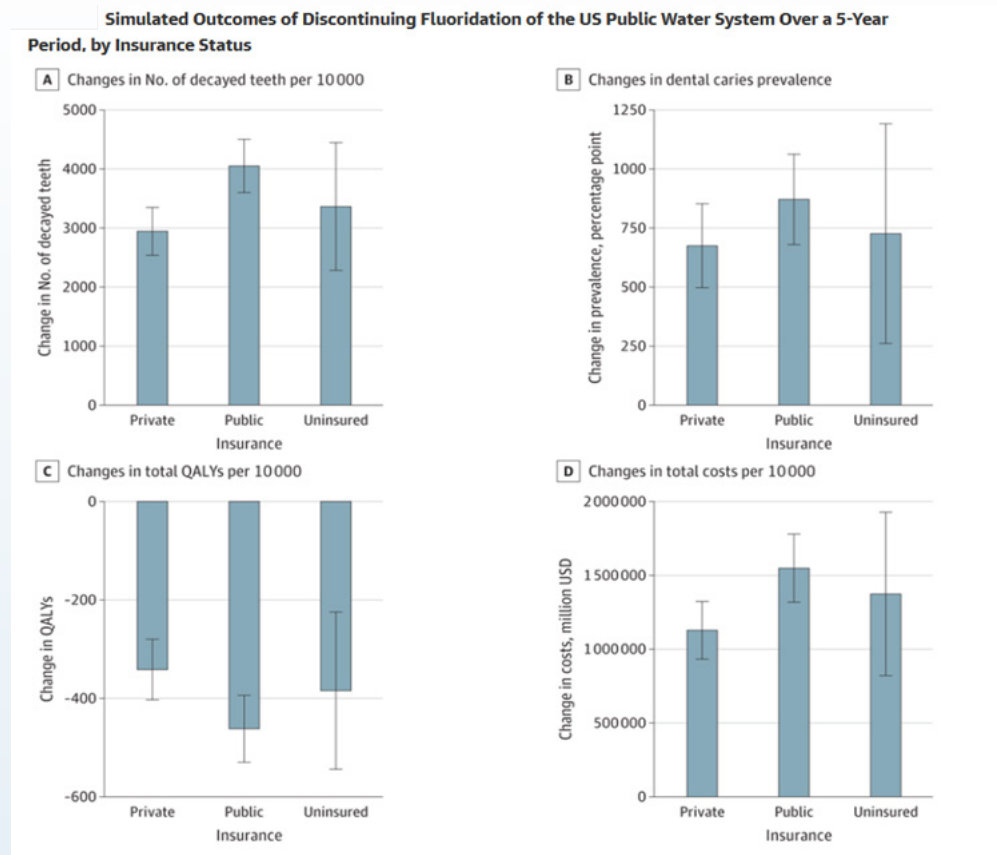
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## GENERAL DENTISTRY NEWS (cont'd)

### **Removing fluoride could spike tooth decay by 7.5%, cost \$9.8B over 5 years: study**

A [study](#) published in JAMA Health Forum found eliminating fluoride from U.S. public water systems would lead to a 7.5% rise in tooth decay and add \$9.8 billion in treatment costs over five years. Conducted by researchers at Harvard and Brigham and Women's Hospital, the study analyzed dental and fluoride data from over 8,400 children. Despite concerns over the health risks associated with exposure to high levels of fluoride, researchers found the study demonstrates the benefits of water fluoridation at the levels currently recommended by the EPA, the NTP and the CDC.



Source: Becker's Dental + DSO Review

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## GENERAL DENTISTRY NEWS (cont'd)

### **ADA urges DOJ to enforce antitrust laws in dental insurance market**

The American Dental Association (ADA) called on the Department of Justice to enforce the Competitive Health Insurance Reform Act and address anticompetitive practices in the dental insurance industry. In a May 21 letter, the ADA criticized limited competition, citing the McCarran-Ferguson Act's past antitrust exemption and the resulting market concentration that harms both patients and providers. The ADA emphasized that, since 2021, dental insurers must comply with federal antitrust laws-no longer shielded from scrutiny-and urged the DOJ to act accordingly. The letter highlighted harms such as suppressed reimbursement, narrow provider networks, and fewer patient choices. The ADA proposed six recommendations, including a market study, updated antitrust guidance, and support for state-level reforms.

Source: ADA News

### **ADHA opposes Nevada bill which'll create alternative hygiene licensure pathways**

The American Dental Hygienists Association is opposing Nevada Senate Bill 495, which would permit individuals to earn a dental hygiene license without graduating from a CODA-accredited program. Instead, candidates could complete a board-approved training course under a dentist's supervision. ADHA argues this lowers professional standards and threatens patient safety. President Erin Haley-Hitz voiced concerns in a letter to members and the healthcare community, warning that the bill could undermine the quality of dental care.

Source: ADHA

### **Medicaid cuts could prompt states to drop dental coverage, CEO warns**

Proposed federal Medicaid cuts could lead states to eliminate dental benefits, warns Michael Curry, CEO of the Massachusetts League of Community Health Centers. The House passed a budget bill on May 22 that includes reductions to Medicaid funding. Because dental coverage is optional under Medicaid, states may choose to reduce or eliminate it to balance their budgets. Curry emphasized the risk to community health centers and patients, who could lose access to affordable oral healthcare and insurance reimbursements.

Source: CommonWealth Beacon

### **ADA urges insurers to maintain coverage for fluoride, preventive care**

ADA leaders issued an [open letter](#) calling on insurers, Medicaid agencies and employers to continue covering preventive dental services, including fluoride treatments. The letter responds to increasing debate around fluoride use and recent policy changes, such as state bans on fluoridation and the FDA's removal of fluoride supplements. The ADA emphasized that preventive care should extend beyond children, as many insurance plans inconsistently define age limits. Leaders warned that rolling back access to proven preventive services could harm public oral health.

Source: ADA News

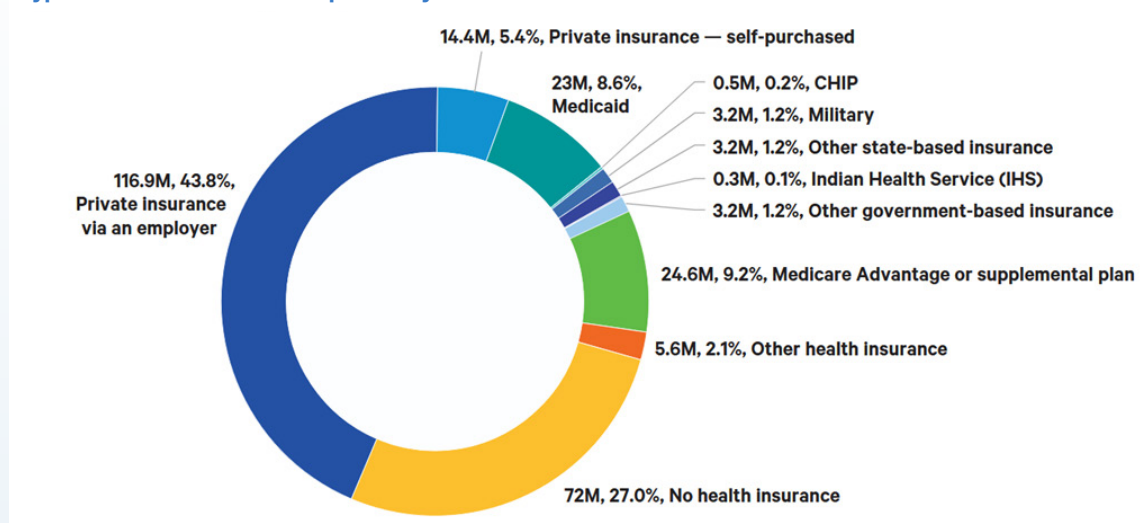
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## GENERAL DENTISTRY NEWS (cont'd)

### **72M U.S. adults lack dental insurance, triple the number without health coverage**

A CareQuest Institute for Oral Health [report](#) finds 27% of U.S. adults do not have dental insurance, compared to 9.5% without health insurance. The report also found that a lack of coverage leads to delayed dental care and worsens overall health, especially for low-income and less-educated individuals. One-third of adults with Medicaid or Medicare still lack dental coverage, and over 80% of those without health insurance also lack dental insurance. Policy gaps remain as Medicare excludes dental care, and Medicaid coverage for adults varies by state. The report surveyed over 9,000 adults conducted between March and May 2024.

#### **Type of Dental Insurance Reported by US Adults**



Source: CareQuest Institute for Oral Health

### **Iowa law ends dental assistant registration requirement**

A recently enacted Iowa law removes the state registration requirement for dental assistants, aiming to ease workforce shortages and improve hiring flexibility. Signed into law on May 1, [HF 805](#) allows unregistered dental assistants to work and potentially perform expanded functions, depending on training and future rules from the Iowa Dental Board. The Iowa Dental Association supported the bill, citing hiring challenges and the more lenient regulations in neighboring states. While registration is no longer required, dentists must ensure unregistered assistants are properly trained and competent.

Source: ADA News

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## GENERAL DENTISTRY NEWS (cont'd)

### **Arkansas fluoride repeal bills fail in committee despite growing debate**

Two Arkansas bills seeking to change the state's water fluoridation policy failed in committee earlier this month. [Senate Bill 2](#) aimed to repeal a law requiring fluoride in drinking water, while [Senate Bill 4](#) would have allowed local governments to call elections on the issue. The proposed legislation would have shifted decision-making from the state to local communities. The failure of the bills comes as other states, including Utah and Florida, move forward with fluoride bans or opt-out measures. The issue remains part of a growing national debate over public water fluoridation.

Source: Becker's Dental + DSO Review

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### **ADA expands mental health support for dentists, students amid rising distress levels**

The ADA said it's offering enhanced mental health resources to its members and dental students in recognition of Mental Health Awareness Month. Nearly half of dentists were categorized as "distressed" or "struggling" in the 2024 Well-Being Index report, reflecting a rise in burnout, fatigue and anxiety. To address this, the ADA provides free access to the Mayo Clinic-developed [Well-Being Index](#), the Talkspace Go self-guided mental health app and discounted Talkspace Therapy. The ADA also spearheaded a bylaw change in Michigan to ensure dentists facing temporary license loss due to mental health challenges retain access to ADA membership benefits and support.

Source: ADA News

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## DSO EXPANSION & CONSOLIDATION

### **The Smilist acquires BrookBeam Dental, expands network beyond 100 offices**

The Smilist, a dental support organization based in Great Neck, New York, acquired BrookBeam Dental, adding 16 practices in New York to its network. With this deal, The Smilist now operates over 100 dental offices. The expansion follows the company's \$285 million untrenched debt facility secured in April 2024 to fuel continued growth.

Source: Becker's Dental + DSO Review

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## DSO EXPANSION & CONSOLIDATION (cont'd)

### **Specialty Smile Partners expands into Florida with acquisition of Pediatric Dental Practice**

Specialty Smile Partners has acquired Little Gators Pediatric Dentistry, a well-established practice in Winter Garden, Florida, led by Dr. Jason Sotto. The practice has served the community for nearly two decades. The acquisition is part of Specialty Smile Partners' plans to expand in the Southeast. The organization is backed by private equity firm Blue Sea Capital.

Source: Becker's Dental + DSO Review

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### **Corporate dentistry takeover seen as inevitable, says DSO CEO**

Corporate consolidation in dentistry appears inevitable, according to Dr. Joshua Elliss, CEO of Encanto Dental Group. He argues that solo practices are being edged out by DSOs, which have superior access to capital, marketing expertise, and operational leverage. Many dentists prefer employment or multi-practice ownership over traditional solo practice, fueling DSO growth, and high interest rates further disadvantage individual dentists compared to corporations that can secure better financing and negotiate more effectively. Dr. Elliss predicts that corporate and group-owned practices will dominate the industry within the next decade.

Source: Becker's Dental + DSO Review

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### **Catalis Dental Lab expands national footprint with Revolution acquisition, East Coast design center**

Catalis Dental Lab Partners acquired Revolution Dental Lab in Sandy, Utah, which it says will strengthen its Western U.S. capacity and support for national DSO operations. Simultaneously, the company launched an East Coast digital design center in Jacksonville, Florida, to complement its existing Arizona facility and boost service for Eastern U.S. clients. These moves bring Catalis to nine locations nationwide and help the company build a leading, tech-driven dental lab network.

Source: Caymus Equity

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### **Dental365 expands in New England with three-practice acquisition**

Dental365 has acquired Nashua Dental Associates, Stiles Family Dentistry, and Dentistry By Design, expanding its presence in New Hampshire and Massachusetts. The move strengthens the company's network and supports its mission to deliver high-quality, patient-focused dental care across the Northeast. CEO Dr. Scott Asnis said the new practices align with Dental365's values of clinical excellence and patient service. This acquisition is part of Dental365's broader growth strategy as it continues scaling operations through strategic partnerships.

Source: Dental365

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## OTHER DSO NEWS

### **GPS Dental adopts VideaHealth AI across 100+ practices**

The company implemented VideaHealth's AI platform in over 100 of its dental offices to enhance care quality and operational efficiency. The AI tool supports improved clinical outcomes by aiding in diagnosis and treatment planning. Since integration, GPS Dental reported a 19% increase in gross production per patient for restorative and periodontal care and a 32% rise in total crown production.

Source: GPS Dental

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### **Align Technology awards research grants to 12 university dental research projects**

The company awarded 12 research grants to universities across the Americas, Europe and Asia Pacific through its 2025 Annual Research Award Program. Now in its 15th year, the program supports studies focused on clinical questions related to clear aligner therapy and digital orthodontic workflows. Selected institutions include the University of Florida, University of Liege and Sydney Dental Hospital, among others, and funded topics range from adolescent adherence to aligners and 3D imaging to periodontal health comparisons and treatment predictability.

Source: Orthodontic Products

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### **Western Dental warns of widespread clinic closures if Prop 56 cuts proceed**

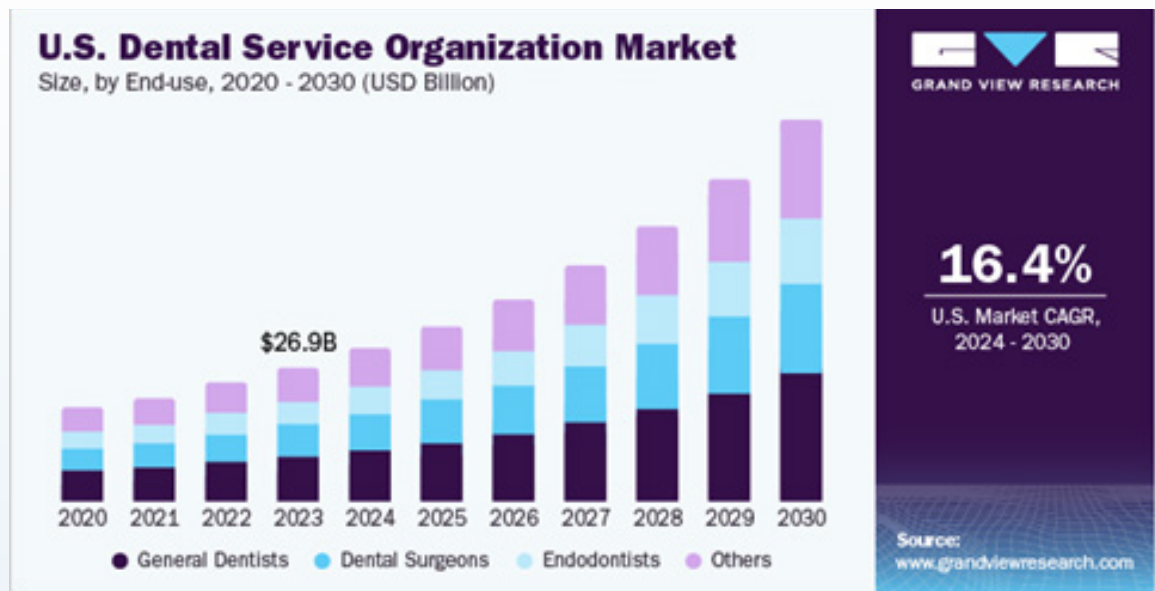
Western Dental, California's largest Medi-Cal dental provider, says it may close up to 50 offices statewide if proposed cuts to Proposition 56 funding are enacted. [Prop 56](#), passed in 2016, allocates tobacco tax revenue to support Medi-Cal dental services and has enabled expanded access to care, especially in underserved communities. Company leaders warn that slashing this funding would reignite a dental access crisis, force reductions in staffing and hours and ultimately increase long-term healthcare costs for the state. Western Dental currently operates 223 offices in 35 counties, providing over 1 million Medi-Cal patient visits annually.

Source: Western Dental

## OTHER DSO NEWS (cont'd)

### **U.S. DSO market set to surge, driven by tech, Demand**

The U.S. DSO market was valued at \$26.9 billion in 2023 and is projected to grow at a 16.4% CAGR through 2030. Growth is fueled by rising dental care demand, expanding technology use and DSOs' ability to streamline non-clinical operations. Dentists are also increasingly partnering with DSOs to reduce administrative burdens and adopt advanced tools like VideaAI, enhancing patient care and work-life balance. Burgeoning initiatives, such as DSO University in Arizona and expanded staff training platforms, further support DSO growth. Other aspects fueling the growing DSO market include telehealth expansion, managed care and growing interest in practice efficiency and entrepreneurship.



Source: Grand View Research

# PRIVATE EQUITY DEALS

## **Private equity in dentistry favors tech-driven, scalable practices**

Private equity investment in dentistry has shifted focus from rapid M&A to sustainable, tech-enabled growth, said Preston Brice, managing partner of Barclay Hill Partners. Investors now prioritize dental groups with standardized practice management systems, data analytics platforms, and automation tools that boost efficiency and reduce staff turnover. Practices like Riccobene Associates have shown that centralized tech infrastructure improves valuation and streamlines due diligence. Experts warn that outdated technology can derail deals and lead to costly integration issues post-acquisition. PE interest is expected to rebound more fully in 2026, with tech, culture, and operational consistency now essential to attracting investors.

Source: DrBicuspid.com

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## **Phase 1 Equity adds orthodontic practice in Tennessee, expands network to 15 locations**

Phase 1 Equity has welcomed a respected multi-site orthodontic practice in Tennessee to its doctor-led platform, marking its first presence in the state and second acquisition this quarter. The practice is known for advanced technology, including 3D imaging, and a strong culture focused on patient-centered care. With this addition, Phase 1 Equity now operates 15 locations, continuing its mission to support clinician autonomy while fostering growth and collaboration. The organization emphasizes shared values, clinical excellence, and doctor ownership across its expanding network.

Source: Phase 1 Equity

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## **Trivest, Vibrant launch True North Dental Partnership Organization**

Trivest Partners and Vibrant Equity launched True North Dental Partnership Organization, a new dentist-led platform starting with eight high-performing practices across Ontario. The Unicompny aims to support clinical excellence and operational efficiency through investments in technology, mentorship and professional development. True North said it's focused on creating a dentist-driven culture that prioritizes patient care while enabling sustainable growth. Backed by healthcare services expertise, the organization is actively seeking partnerships to expand its footprint in Canada and eventually into the U.S.

Source: True North

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## PARTNERSHIP AND INNOVATION

### **Pitt Dental School, hospital partner for Pennsylvania's first regional dental training center**

The University of Pittsburgh School of Dental Medicine is partnering with Pitt-Titusville and Titusville Area Hospital to open Pennsylvania's first regional dental training center. Set to launch in July 2026, the center will train general practice residents, hygienists, and dental assistants. Trainees will provide supervised care to patients, expanding access to dental services, and the program will offer hybrid learning to support students in rural areas without requiring relocation.

Source: University of Pittsburgh

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### **Dentsply Sirona renews Women in DSO partnership to help create welcoming workplaces**

Dentsply Sirona renewed its partnership with Women in DSO, extending support through 2025 as part of its broader inclusion strategy. The company handles initiatives like global conversations, employee engagement events and a digital inclusion pledge to foster a diverse and equitable workplace. As a founding partner, Dentsply Sirona provides mentorship, event access and leadership opportunities for women in dental service organizations. The company's inclusion efforts, including partnerships with the National Dental Association and Paradigm for Parity, contributed to its recognition as one of Newsweek's [America's Most Responsible Companies](#) for the fourth year in 2025.

Source: Dentistry Today

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### **Heartland Dental extends strategic partnership with Leixir Dental Labs through 2029**

Heartland Dental has renewed its partnership with Leixir Dental Laboratory Group for four more years, continuing their collaboration to support over 3,000 dentists nationwide. Leixir will remain a key provider of lab services, offering digital solutions, clinical training, and technical assistance to Heartland-supported practices. The partnership aims to boost efficiency, care quality, and practice growth through innovations like digital dentures. Both organizations emphasized their shared commitment to advancing dental care and supporting doctors with high-quality tools and services.

Source: Dentistry Today

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# LITIGATION

## **Court revives dentist's TCPA lawsuit against United Concordia over fax ads**

A lawsuit filed by Michigan dentist Dr. Brian Lyngaas against United Concordia will proceed after the U.S. Court of Appeals for the Sixth Circuit reversed a previous dismissal. Dr. Lyngaas alleged the insurer violated the Telephone Consumer Protection Act by sending unsolicited fax advertisements in 2020 and 2021. While a district court ruled the faxes weren't ads, the appeals court found they did qualify under TCPA, as they promoted third-party products through marketing deals. The case now returns to the lower court for further proceedings.

Source: Bloomberg

## **Woman charged with practicing dentistry using forged license in Georgia**

Emily Rochelle Brannon was arrested for allegedly practicing dentistry without a valid license at a Georgia dental clinic using a forged document. In 2022, she presented a fake license at Byrd Dental Group in Douglasville, falsely appearing to be issued by the Georgia Board of Dentistry. Although she was ordered to cease and desist, she evaded arrest for over two years until being captured in Tennessee in May 2024. Brannon now faces charges of forgery, unlicensed practice and being a fugitive from justice. She was released on a \$24,000 bond.

Source: DrBicuspid.com

## **Former employees sue West Virginia dentist over hidden bathroom camera**

Dr. Jeremy Michael Crow of Crow Dental Associates in Weirton, West Virginia, faces lawsuits from 15 former employees after being arrested on 39 counts of invasion of privacy. Each criminal count carries up to one year in jail and a \$5,000 fine. The women, who worked in various roles, allege Crow planted a hidden camera disguised as a water bottle in a staff-only bathroom and accuse him of sexual harassment. The device was discovered in May 2024, prompting police involvement and Crow's arrest in August. Police found no evidence of cameras in patient areas.

Source: DrBiscuspid.com

# STAFFING

## **Heartland Dental Named One of America's Greatest Workplaces in Healthcare by Newsweek**

Heartland Dental was recognized by Newsweek as one of America's Greatest Workplaces in Healthcare for 2025. The award highlights the company's strong workplace culture, employee satisfaction and investment in professional growth across its 20,000+ team members and 1,800 supported locations. The ranking was based on surveys from over 150,000 employees and more than 3.3 million company reviews. Heartland says the award is proof of the company's ongoing commitment to fostering a supportive, doctor-led culture with meaningful career opportunities.

Source: Heartland Dental

## **Over 7,000 dental shortage areas across U.S., over 10,000 practitioners needed**

The U.S. has 7,063 designated dental professional shortage areas, according to June 2025 data from the Health Resources and Services Administration (HRSA). To meet current needs, an estimated 10,155 dental practitioners are required nationwide. California, Alaska, Missouri, and Texas are among the most affected states, each with over 250 shortage areas. The widespread gaps in access to dental care emphasize the ongoing dental professional shortages in rural and underserved communities.

Source: Health Resources and Services Administration

## **Orthodontist salaries rise over 10% since 2019, reaching \$254K in 2024**

Orthodontist compensation in the U.S. from 2019 to 2024 rose from \$230,830 to \$254,620 annually. The mean hourly wage also climbed from \$110.98 to \$122.41 during the same period and, despite a drop in 2022, salaries rebounded in 2023 and 2024. Connecticut ranked as the highest-paying state in 2024, with an average orthodontist salary of \$381,660.

Source: The Bureau of Labor Statistics

## **Oral surgeon salaries surge 52% since 2019, averaging \$360K in 2024**

The average annual salary for oral and maxillofacial surgeons rose 51.6% from \$237,570 in 2019 to \$360,240 in 2024. Hourly wages increased from \$114.21 to \$173.19 over the same period. Despite slight dips in 2020 and 2022, the trend shows strong overall growth. North Carolina topped the charts as the highest-paying state in 2024, with an average salary of \$400,440.

Source: The Bureau of Labor Statistics

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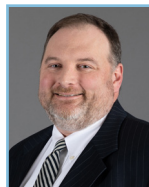


**Vince Nardone**

Partner and Co-Chair, Dental/  
DSO Industry Team

[vnardone@beneschlaw.com](mailto:vnardone@beneschlaw.com)

T: 614.223.9326



**Robert A. Marchant**

Partner and Co-Chair, Dental/  
DSO Industry Team

[rmarchant@beneschlaw.com](mailto:rmarchant@beneschlaw.com)

T: 216.363.4489



**Frank Carsonie**

Partner and Chair, Benesch  
Healthcare+ Practice Group

[fcarsonie@beneschlaw.com](mailto:fcarsonie@beneschlaw.com)

T: 614.223.9361



**Ira C. Kaplan**

Partner, Corporate &  
Securities Practice Group

[ikaplan@beneschlaw.com](mailto:ikaplan@beneschlaw.com)

T: 216.363.4567



**W. Clifford Mull**

Partner, Benesch  
Healthcare+ Practice Group

[cmull@beneschlaw.com](mailto:cmull@beneschlaw.com)

T: 216.363.4198