



Dental/DSO Industry Newsletter

Dental/DSO Industry Market Intelligence

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DentalForum USA Fall 2025

SEPTEMBER 15–17, 2025

The Omni Frisco Hotel at The Star in Dallas, Texas

DentalForum USA is an event series tailored specifically for DSOs, group practices and dental industry vendors. It is designed to foster business growth, networking and partnerships through a unique format of pre-scheduled, one-to-one meetings, conference sessions and peer networking. The event is focused on an audience of senior executives and decision makers from leading and emerging DSOs, group practices and dental suppliers and includes high-level networking in a luxury setting, with social events designed to foster lasting business relationships.

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](#).

DS World Las Vegas 2025

September 25-27, 2025

MGM Grand, Las Vegas

DS World is an annual digital dentistry event that offers advanced education, hands-on technology demonstrations and breakout sessions to help improve patient care. Attendees can network with industry leaders, innovators and peers while exploring the latest dental solutions. The conference also features world-class entertainment and immersive experiences, making it both an educational and memorable experience.

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

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CALENDAR OF EVENTS (cont'd)

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](#).

Dental Leadership Summit 2025

OCTOBER 23–25, 2025

The Grand America Hotel, Salt Lake City, Utah

The Dental Leadership Summit 2025 (formerly the DSO Leadership Summit) is a premier event for dental industry leaders, DSOs, group practice owners and innovators. It celebrates its 10th anniversary in 2025 and is recognized as a top education and networking event for the group dentistry sector.

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.

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KEY FINDINGS

ADA budget cuts, program suspensions, putting dental health at risk

Moves by the federal government are likely to hurt the dental industry and its customers

The ADA will cut [\\$20 million](#) from its 2025 budget to balance finances and recover from years of deficit spending. These cuts, approved in July, will affect multiple programs, reduce staff, change outreach strategies and lower operational and volunteer expenses. Planned initiatives such as the AFI Certified Program, ADA Loyalty Program and Innovation Advisory Committee work have been suspended. Since March 2022, the ADA has already used \$142 million from reserves to support system upgrades, advocacy efforts and other key priorities.

In addition to budget management, the ADA is actively advocating for [reduced regulatory burdens](#) on dental providers. It has submitted recommendations to HHS to streamline administrative processes, simplify credentialing for Medicare Advantage and Medicaid and ease compliance requirements for small practices. The ADA is also urging Congress to [reform Medicare Advantage dental benefits](#) to improve access, transparency and insurer competition. Furthermore, it requests that the DEA [revise costly registration rules](#) requiring separate fees for dentists with multiple practice locations, arguing this would reduce expenses and expand care access.

The ADA continues to defend the safety and value of [fluoride supplements](#) amid FDA reviews, emphasizing science-based decision-making and public education. It also [launched](#) a centralized webpage to improve access to dental informatics standards, including AI and imaging technologies. Meanwhile, federal lawmakers are considering bills to expand dental care access and insurance coverage, although some budget cuts to Medicaid and Medicare remain under discussion. The ADA remains focused on workforce programs and policy reforms to address oral health disparities and strengthen the dental profession.

Sources: ADA News

DSOs seeing stronger demand in 2025 amid uptick in AI adoption

AI is helping improve customer service, boost revenue, with private equity interest increasingly turning to smaller DSOs

DSO leaders report stronger-than-expected [patient demand](#) throughout 2025, along with significant growth in the adoption of AI tools to enhance diagnostics and increase case acceptance. [Labor shortages](#) continue to challenge DSOs, with a new emphasis on flexibility and autonomy as critical factors for retaining hygienists and staff. Patients are increasingly treating oral surgery as a consumer service, demanding cost transparency and influencing marketing strategies. Private equity interest is shifting away from large-scale aggregation toward smaller, more nimble DSO platforms.

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KEY FINDINGS (cont'd)

Innovative AI technologies are reshaping the dental industry's revenue cycle and clinical training. VideaHealth recently launched [ClaimsAI](#), an AI-driven tool that automates claim attachments and narrative generation, cutting claim denials and speeding up reimbursements, with early users clearing backlogs in weeks. RipeGlobal introduced its AI-powered [dental education platform](#), offering immersive, hands-on training that supports thousands of clinicians worldwide through programs in restorative dentistry, implantology, and more. These technologies aim to improve clinical outcomes, boost operational efficiency and increase return on investment for dental practices.

Workforce development also remains a priority, as highlighted by Wisconsin's launch of the state's first registered dental assistant apprenticeship program, which combines paid instruction with on-the-job training to expand career pathways. PDS Health expanded digital dental [imaging technologies](#) within its network to enhance diagnostic accuracy and collaboration. Meanwhile, surveys indicate a rising shift in dentists' participation in insurance networks, and AI tools continue to revolutionize diagnostics, insurance approvals and patient communication across the dental sector.

Sources: Becker's Dental + DSO, VideaHealth, RipeGlobal, Government of Wisconsin, PDS Health

GENERAL DENTISTRY NEWS

[Childhood poverty linked to lifelong tooth decay: Report](#)

Benevis' "Poverty Shapes Oral Health" [report](#) found strong links between poverty and long-term oral health disparities. The report cites data showing poor children aged 2–5 have twice the rate of tooth decay as their wealthier peers, while low-income adults suffer triple the rate of untreated decay. Despite Medicaid and CHIP improving access, 67% of U.S. dentists do not treat children covered by these programs. Benevis urges expanded access and systemic reforms to close these gaps.

Source: Benevis

Poor Oral Health is a Marker of Socioeconomic Inequality

Oral diseases hit disadvantaged populations hardest. Globally, people with lower socioeconomic status have a higher burden of dental disease across their lifetime (1).

Roughly half of U.S. kids lack routine dental care due to social, economic, and geographic hurdles (2).



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GENERAL DENTISTRY NEWS (cont'd)

ADA to cut \$20M from Budget, suspend select programs

The ADA will cut \$20 million from its 2025 budget to balance finances and recover from years of deficit spending. Approved in July, the cuts will affect multiple programs, reduce staff, alter outreach strategies, and lower operational and volunteer expenses. The ADA is suspending several planned initiatives, including the AFI Certified Program, the ADA Loyalty Program and work on the Innovation Advisory Committee. It has already used \$142 million from reserves since March 2022 to fund system upgrades, advocacy efforts and other priorities.

Source: ADA News

ADA launches centralized webpage to streamline access to dental informatics standards

The ADA said it updated its landing page to make dental informatics standards more accessible and easier to adopt. The standards are organized into 10 categories, including AI, imaging, clinical data exchange and e-prescriptions, aimed at improving interoperability and consistency in digital dental care. The site enables software developers, vendors and providers to align with best practices and purchase standards directly, with ADA members receiving discounts and free access to technical reports.

Source: ADA News

Seven federal bills aim to expand dental care access, coverage

Congress is considering seven bills focused on improving dental care access and insurance coverage. These include the TEETH Act, which would require independent expert input on water fluoridation guidelines, and proposals to expand Medicare and Medicaid dental benefits, covering routine and emergency dental services. Other bills aim to increase access to oral health products through flexible spending accounts, reduce dental care costs and expand dental coverage for veterans. Meanwhile, House Republicans are working on budget cuts targeting Medicaid and Medicare spending.

Source: Becker's Dental + DSO Review

ADA urges DEA to ease costly registration rules for dentists with multiple locations

The ADA is asking the DEA to revise its rule requiring dentists to hold a separate \$888 registration every three years for each practice location where they prescribe controlled substances. The ADA said the rule adds unnecessary costs without improving public safety. It proposed allowing a single registration to cover multiple in-state sites that don't store controlled substances or creating a lower-cost "satellite" registration. The ADA argued the change would reduce regulatory burdens, improve provider efficiency and expand care access, especially in underserved areas. Dentists typically prescribe controlled substances in low volumes for short-term use.

Source: ADA News

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GENERAL DENTISTRY NEWS (cont'd)

ADA urges HHS to cut dental regulatory burdens to improve provider efficiency

The ADA submitted [nine recommendations](#) to HHS, aiming to reduce federal regulatory burdens on dental providers, with a focus on streamlining administrative processes and improving access to care. Key proposals include simplifying credentialing for dentists in Medicare Advantage and Medicaid plans, standardizing claim forms and reforming complex prior authorization rules. The ADA also called for easing compliance requirements for small dental practices, such as modifying language access mandates and good-faith estimate rules.

Source: ADA News

ADA calls for Medicare Advantage dental benefit reforms to improve access, transparency

The ADA urges Congress to reform Medicare Advantage dental benefits, highlighting limited access, poor transparency and market concentration issues that hinder oral health outcomes. Despite 97% of enrollees having some dental coverage, many see no improvement in dental visits due to restrictive plan features and limited insurer competition. The ADA recommends clearer marketing disclosures, stronger network transparency and the removal of administrative barriers to dentist participation.

Source: ADA News

Majority of Americans support water fluoridation despite growing controversy

A CareQuest Institute [survey](#) found over 80% of Americans support or are neutral toward community water fluoridation amid increasing state bans and federal scrutiny. Only 6% favor banning fluoridation entirely. The survey also revealed 79% believe the government should protect and improve oral health, while 96% trust their family doctor or pediatrician for information on fluoride. CareQuest says the results highlight strong public backing despite health concerns and policy debates.

In your opinion, is the use of fluoride in public water supplies...?

	<i>Frequency</i>	<i>Percent</i>
Healthy or beneficial for the public	464	41.7
Has no real impact	156	14.0
Harmful or detrimental for the public	213	19.1
I don't know/not sure	281	25.2
Total	1114	100.0

Source: CareQuest

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GENERAL DENTISTRY NEWS (cont'd)

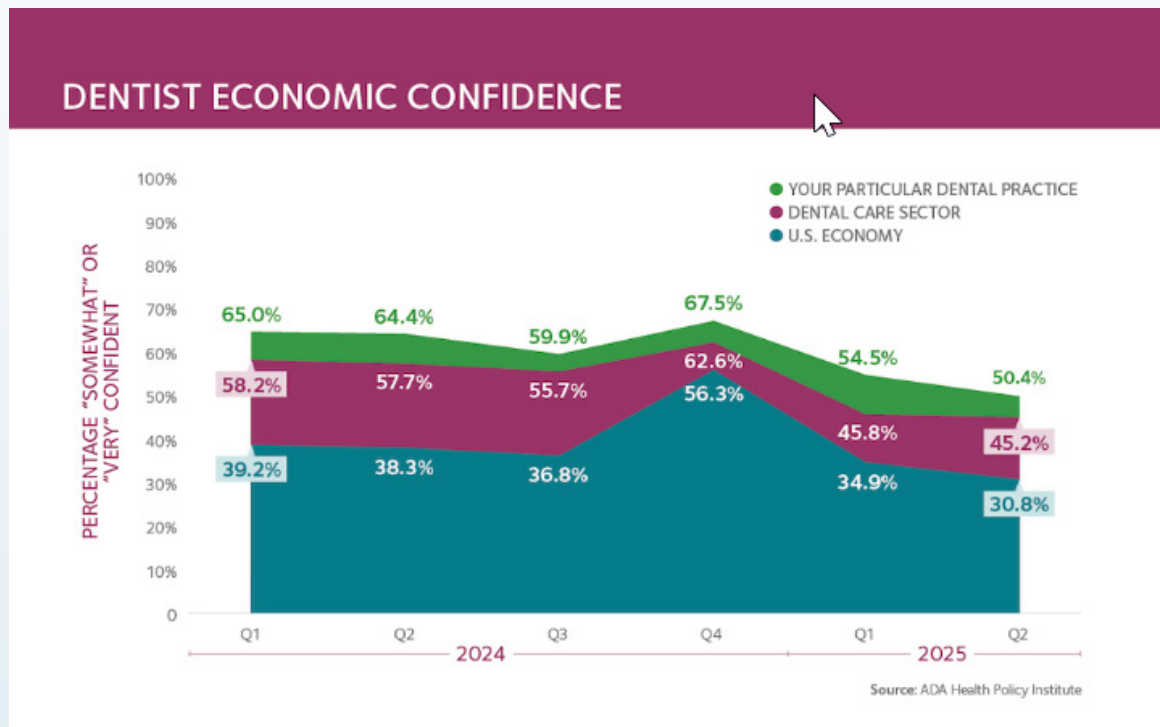
Nearly one-third of dentists consider dropping insurance networks in 2025

An ADA Health Policy Institute [survey](#) reveals that about 31% of dentists may leave insurance networks this year. So far, 23.8% of dentists have already exited such networks, while 31.8% are considering doing so later in 2025. Meanwhile, 44% of dentists plan to remain in insurance networks. ADA says the data reflects ongoing shifts in dentists' participation in insurance plans amid economic and industry changes.

Source: Becker's Dental + DSO Review

Dentists showing declining confidence in U.S. economy, dental sector

An ADA Health Policy Institute [report](#) reveals dentists' confidence in the U.S. economy, dental care sector and their own practices has dropped notably in Q2 2025 compared to the previous year. Only 30.8% of dentists expressed confidence in the economy, down from 38.3% in Q2 2024, while confidence in the dental sector fell to 45% from 57.7%. About half of dentists remained confident in their own practices, down from 64.4%. Those confident cited stable leadership and economic indicators, while skeptics pointed to leadership concerns, tariffs, rising costs and economic uncertainty.



Source: ADA News

DSO EXPANSION & CONSOLIDATION

Heartland Dental added 50+ practices, expanded AI, workforce initiatives in 2025

Heartland Dental grew by more than 50 practices in the first half of 2025, expanding its footprint in 14 states through new builds and 13 affiliations. The company opened 38 de novo locations and launched HDflex, a staffing platform giving hygienists and assistants control over shift selection. Investments continued in AI tools and patient financing programs, while Heartland Dental University logged over 100,000 course completions in the past year. In April, the DSO partnered with Concorde Career Colleges to build a joint campus in Florida, set to train up to 190 dental hygiene and assisting students annually.

Source: Heartland Dental

Kleer, Membersy merge, rebrand as Clerri, broadens offerings

Dental membership companies Kleer and Membersy have rebranded as Clerri following their May 2024 merger. Clerri is broadening its focus from membership plans to a comprehensive care access platform. The company supports over 4,000 independent dental practices, 200+ dental groups and more than 30 DSOs. Clerri says the rebrand signals a strategic shift to offer wider dental care solutions.

Source: Clerri

OTHER DSO NEWS

DSO market to grow 17.6% annually through 2032, driven by efficiency demands, tech adoption

The DSO market is projected to grow at a 17.6% CAGR through 2032, potentially surpassing \$30 billion. Growth is fueled by rising demand for operational efficiency, enhanced patient care and tech adoption —such as AI, IoT and blockchain—in dental practices. Leading DSOs include Heartland Dental, Aspen Dental, Pacific Dental Services, and Smile Brands, among others. Despite the expected growth, the market is still grappling with challenges such as regulation, supply chain issues and staffing shortages.

Source: Stats N Data

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OTHER DSO NEWS (cont'd)

Pearl names DSO veteran Cher-Marie Scott as VP of International Sales

Dental AI company Pearl appointed Cher-Marie Scott as vice president of international sales to lead global market expansion. Scott brings extensive experience from clinical and management roles in major European DSOs and recently headed DSO operations at dental tech firm Ivoclar. She will focus on growing Pearl's AI system adoption across Europe and further into North America.

Source: Pearl Dental

Planet DDS sees 28% growth in DSO tech market, pushes for AI, cloud standardization

Planet DDS reported 28% year-over-year revenue growth, solidifying its lead as the go-to software provider for DSOs amid industry-wide consolidation. Over half of the top 60 DSOs now use its platform, and it has not lost a single competitive deal for DSOs with 20+ locations in the past 18 months. The company launched new tools like the Performance Monitor Program to ease transitions from legacy systems and expanded its API network to enhance integrations and AI capabilities. Major clients this year include Guardian Dentistry Partners and The Smilist, with a combined 260+ locations. Planet DDS also launched educational and community initiatives while winning multiple innovation awards for its DentalOS platform.

Source: Dentistry Today

PRIVATE EQUITY DEALS

DSO leaders cite strong patient demand, AI growth, shifting PE interest among trends

DSO executives report stronger-than-expected patient demand in 2025, alongside growing adoption of AI tools to improve diagnostics and case acceptance. Labor shortages remain a major challenge, with flexibility and autonomy now key to retaining hygienists and other staff. Patients are increasingly treating oral surgery like a consumer service, asking more about costs and influencing marketing strategies. Private equity interest is shifting toward smaller, nimble DSO platforms rather than large-scale aggregation plays.

Source: Becker's Dental + DSO Review

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PRIVATE EQUITY DEALS (cont'd)

Private equity firm acquires dental implant maker ZimVie for \$730M

ZimVie, a dental implant manufacturer spun off from Zimmer Biomet, agreed to be acquired by healthcare-focused private equity firm Archimed. The deal, approved unanimously by ZimVie's board, offers shareholders \$19 per share and is expected to close by year-end. ZimVie has been refocusing on dental implants after selling its spine business in 2023 and reported narrowing losses in late 2024 as it began exploring a sale.

Source: Becker's Dental + DSO Review

PARTNERSHIPS AND INNOVATION

Smile Source, SimplyTest partner to add saliva screening in 800+ dental practices

Smile Source and SimplyTest teamed up to introduce SimplyTest's salivary screening for periodontal pathogens, caries-related organisms, Candida albicans and viruses across Smile Source's network of over 800 independent dental practices. The test enables earlier detection and care for periodontal disease, which is linked to serious health issues like Alzheimer's, diabetes and cardiovascular disease. The partnership aims to enhance preventive oral healthcare nationwide.

Source: Smile Source

PDS Health expands digital dental imaging technology to its network

PDS Health integrated DEXIS dental imaging technologies into its network of over 1,000 practices. Digital tools added to the network include the DTX Studio Clinic and DEXIS OP 3D and OP 3D Pro CBCT systems. PDS Health technologies aim to enhance diagnostic accuracy and clinical collaboration and are expected to improve the overall patient experience.

Source: PDS Health

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PARTNERSHIPS AND INNOVATION (cont'd)

VideaHealth launches ClaimsAI to cut dental industry's \$15B in RCM waste

VideaHealth launched ClaimsAI, an AI-powered revenue cycle management tool designed to reduce dental industry losses from claim denials and inefficiencies, which total an estimated \$15 billion annually. ClaimsAI automates claim attachment creation, image selection and narrative generation, resulting in up to 90% faster submissions and thousands of dollars recovered per location each month. Early adopters report clearing weeks-long A/R backlogs in just three weeks. The tool integrates with existing systems and requires no setup for current ClinicalAI users.

Source: VideoHealth

RipeGlobal launches AI-Driven dental training platform to elevate clinical skills

RipeGlobal launched its AI-powered dental education platform in the U.S., offering immersive, hands-on simulation training to DSOs, group practices and private dentists. Already used by over 10,000 professionals across 35 countries, the platform ships practice kits directly to clinicians and enables real-time learning with more than 80 global educators. Dr. Roshan Parikh joins as Chief Revenue Officer to lead U.S. growth, supported by a new Global Advisory Committee led by Brian Colao and Dr. Farzeela Rupani. Key programs include fellowships in restorative dentistry, implantology, aligners and the Dental Associate PowerUp Program (DAPPr). RipeGlobal aims to improve clinical outcomes, confidence, and ROI through scalable, real-world training.

Source: RipeGlobal

AI products revolutionizing dentistry with faster diagnoses, clearer costs, fewer claim denials

AI is rapidly transforming the dental industry, improving diagnostic accuracy, streamlining insurance approvals and increasing patient trust. AI tools can now analyze X-rays with high precision, highlight issues like cavities and bone loss, and provide clear visual explanations to patients, boosting confidence and treatment acceptance. Real-time insurance verification tools reduce confusion around costs and dramatically cut down claim denials and delays. A growing number of dental practices, insurers and schools are integrating AI, reflecting a broader shift toward proactive, tech-enabled care.

Source: Forbes

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PARTNERSHIPS AND INNOVATION (cont'd)

ChatGPT useful to train dental students, even with observed shortcomings: Study

A study found integrating ChatGPT into a dental school course can help students critically assess AI's role in generating informed consent forms. Third-year students compared ChatGPT outputs to professional examples, identifying key issues like vague content, lack of personalization and advanced reading levels. Though rated only moderately effective, students saw value in using AI as a starting point for consent documents under professional guidance. Raising awareness of AI's limitations in clinical settings, and emphasizing the need for supervised use in dental education, researchers recommend future work with newer AI models and more structured prompts.

Source: Dental Tribune

LITIGATION

Law firm probes Align Technology after stock drop, securities concerns

Johnson Fistel launched an [investigation](#) into Align Technology for potential violations of federal securities laws on behalf of investors. The move follows the company's Q2 earnings report, which showed flat year-over-year revenue. Align's stock price fell more than 31% on July 31 after the results were announced. The company forecasts Q3 global revenue between \$965 million and \$985 million.

Source: Johnson Fistel

Heartland Dental faces class-action lawsuit over alleged AI call monitoring without consent

A class-action lawsuit has been filed against Heartland Dental, alleging that the DSO is using AI technology to monitor patient phone calls without their consent. The suit, filed by patient Megan Lisota in federal court, claims that Heartland and its supported practice, Tru Family Dental, allowed RingCentral AI to analyze calls in real-time without notifying the callers. This alleged activity may violate the U.S. Wiretap Act and affect all U.S. patients who contacted Heartland-affiliated clinics. The lawsuit also claims RingCentral used these calls to train its AI models for commercial purposes.

Source: DrBicuspid

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STAFFING

Core values among staff drive exceptional dental customer service

DrBicuspid says strong core values, a clear mission statement and a positive culture are vital for delivering outstanding customer service in dental practices. These principles must be consistently reinforced, with leadership setting the tone for team behavior and morale. DrBicuspid adds that every patient should feel valued and energized after their visit, and that excellent customer service should extend to staff as well. Regularly revisiting and discussing values helps maintain a positive environment, improving both team performance and patient experiences.

Source: DrBicuspid

ADA urges congress to reauthorize federal dental workforce programs

The ADA is calling on Congress to reauthorize and fund federal dental workforce programs aimed at improving access to care in underserved areas. The ADA submitted a letter to the House Energy and Commerce Committee's Subcommittee on Health ahead of a hearing on healthcare legislation. It specifically supports the HRSA Title VII oral health training programs and the dental faculty loan repayment program. The push is part of efforts to address oral health disparities and strengthen the dental workforce.

Source: ADA News

Association for Dental Safety launches institute to continue CDC's oral health work after federal layoffs

Following the CDC's oral health division closure, the Association for Dental Safety (ADS) created the Institute for Dental Safety and Science to maintain clinical guidelines and best practices. The institute will update the CDC's infection control guidelines for dental settings, last revised in 2003, beginning with dental unit water line standards. ADS leaders emphasized the importance of a national body to provide guidance that states and regulators rely on for developing their own rules. Beyond guidelines, the institute plans to offer educational tools and resources focused on patient and provider safety in dental care.

Source: ADS

Dental staffing firm worth \$2.45M hits market

A turnkey dental staffing company with \$2.45 million in 2024 revenue is up for sale as its owner prepares to retire. The sellers, Prime Exits and American Healthcare Capital, claim the business has longstanding contracts with major dental providers, schools, government agencies and nonprofits and is well-positioned for expansion with minimal investment. Revenue has steadily grown from \$1.35 million in 2021 to over \$2.58 million in 2023, with EBITDA rising to \$721,441 in 2024. The current owner will provide assistance during the transition and existing staff are expected to remain in place.

Source: Healthcare Business News

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Simply Dental credits leadership, culture for strong hiring, retention

Simply Dental Management says its leadership-driven, values-based culture helped it hire and retain top talent despite nationwide staffing shortages. The dentist-owned DSO emphasizes professional development, mentorship and a supportive work environment as key factors in attracting clinical and administrative staff. All practices follow shared patient care standards but operate with autonomy under the leadership of local doctors and managers, fostering a sense of community and ownership. SDM's approach centers on core principles: We Care, Do What's Right, and Encourage Growth & Development.

Source: Simply Dental

Wisconsin launches state's first dental assistant apprenticeship program

Wisconsin's Department of Workforce Development introduced the state's first registered dental assistant apprenticeship program. The 15-month program combines 592 hours of paid instruction with 2,008 hours of on-the-job training, offering apprentices a minimum wage of \$20–\$22 per hour during training. This program aims to expand dental workforce training and create paid career pathways in Wisconsin.

Source: Department of Workforce Development

**For more information regarding our Dental Industry/DSO Practice, or
if you would like to contribute to the newsletter, please contact:**

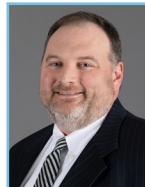


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