

Dental/DSO Industry Newsletter

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Calendar of Events

The Intelligent DSO Series

MAY 18–20, 2026

Kiawah Island Golf Resort, SC

This event is presented as an invitation-only, three-day gathering for DSO CEOs, CFOs, COOs, and founders. Group Dentistry Now says the format is intentionally small, limited to 10-12 executives, and designed for candid discussion rather than a trade-show floor or general-panel format. The current agenda centers on capital structure, technology investment, financing clinical technology, and data-driven financial intelligence, with the stated goal of helping attendees sharpen decisions around growth, infrastructure and visibility into financial performance. The event is scheduled for Kiawah Island Golf Resort in South Carolina.

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

ADSO Summit 2026

JUNE 15–17, 2026

Chicago, IL

The ADSO's official Summit page says Summit 2026 is designed to bring together not just CEOs, but broader management teams across operations, finance, IT, HR, marketing, clinical and compliance. Group Dentistry Now's event listing adds that the Summit is planned by DSOs for DSOs, is being held in Chicago, and is structured around thought leadership, innovation, networking and peer connections on the most pressing issues in the dental industry. The posted agenda includes sessions on state of the industry and value creation, consumer trends, AI and building high-performing teams, along with a solutions center and multiple networking events.

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

Florida Dental Conference 2026

JUNE 25–27, 2026

Orlando, FL

Situated at the Gaylord Palms Resort & Convention Center in Orlando/Kissimmee, this event offers comprehensive continuing education, a large exhibit hall featuring new dental products and services, and business forums. The conference addresses specific challenges and opportunities for DSOs in fast-growing markets like Florida.

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

DSO Tech Summit 2026

SEPTEMBER 23–24, 2026

Nashville, TN

The official DSO Tech Summit site says the 2026 theme is "Optimization & Trust" and frames the event around helping DSO leaders move from chasing new tools to getting more value from what they already use. The event materials emphasize technology optimization, platform consolidation, measurable ROI, and trust in AI, automation, cloud platforms, and data decisions. Group Dentistry Now's companion event listing describes the summit as focused on the next chapter in dental technology leadership and notes that the event is meant to be small and intentionally curated, without the standard trade-show separation between attendees, speakers and vendors.

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

Regulation and Reimbursement Pressures Are Reshaping How DSOs Engage With Payers and Compliance Frameworks

Coverage flexibility, ERISA reform and interoperability are converging into a more complex regulatory environment

DSOs are operating in a more regulation-driven environment, where coverage design, insurance administration and interoperability are no longer side issues. The ADA-led Organized Dentistry Coalition's push for CMS to preserve adult dental coverage flexibility points to potential downstream effects on plan design, exchange participation and payer-provider strategy. At the same time, the federal bill targeting the ERISA "self-funded plan" gap shows continued pressure to bring more dental benefit administration under state insurance reform rules, which could affect reimbursement disputes, prior authorization practices and enforcement risk. The ADA's push for federal dental imaging interoperability standards adds a parallel technology-regulation track: if dental imaging moves toward open standards, interoperable APIs and dental-specific certification criteria, DSOs and vendors may face new expectations around data portability, imaging workflows and platform integration. Taken together, these items point to a DSO landscape in which growth increasingly depends not just on scale, but on the ability to manage payer complexity, anticipate coverage changes and modernize data infrastructure.

Recent Benesch commentary appears directionally consistent with that framing: [Vince Nardone](#), Co-Chair of Benesch's Dental/DSO Industry Group, said in a February 2026 [interview](#) in Dental Bite that DSO deal activity is returning, but under conditions that differ from the 2020-2022 period.

Sources (multiple): ADA News, March 24, 2026; ADA News, March 12, 2026; ADA News, March 17, 2026; ADA News, March 5, 2026; Vince Nardone interview (February 11, 2026).

Consolidation is Evolving into a More Disciplined, Multi-Model Growth Strategy Supported by Technology and Workforce Investment

DSOs are combining affiliations, de novos, innovation partnerships and talent strategies to scale more sustainably

DSO expansion is still active, but it is taking place through a broader mix of affiliations, de novos, specialty partnerships, retail-based growth and platform-building rather than simple roll-up activity. The March deal roundup shows continued affiliation and expansion activity across MB2 Dental, Heartland Dental, Beacon Oral Specialists, Premier Care Dental Management and The Smilist. U.S. Dental Professionals' expansion from five to fifteen Walmart-based locations suggests that some groups are testing retail-embedded growth models, while PDS Health's emphasis on predictive dentistry and medical-dental integration shows that scale is increasingly tied to technology and care-model development.

Clerri's 2026 trend piece [highlights](#) continued consolidation, AI-driven diagnostics, staffing shortages and a shift toward alternative revenue models; the Smile Partners USA/Clear Aligner Advisor partnership shows that DSOs are investing in structured training systems to drive adoption and retention; Dentalcorp's technology demo day

Key Findings (cont'd)

reflects a more formalized approach to sourcing innovation; and the Group Dentistry Now staffing roundup shows active investment in recruiting, integration, education and operations leadership. Even the Apex Dental Laboratory recapitalization supports the view that capital is moving not only into DSOs themselves, but also into adjacent dental infrastructure. Recent Benesch commentary again lines up with this: Vince Nardone's February 2026 remarks described a DSO deal market that is rebounding in a different, more selective form.

Sources (multiple): Group Dentistry Now, April 1, 2026; Group Dentistry Now, March 30, 2026; Clerri, March 5, 2026; Dentistry Today, March 27, 2026; Group Dentistry Now, March 20, 2026; Group Dentistry Now, March 9, 2026; MarketWatch, March 31, 2026; Vince Nardone interview (February 11, 2026).

General Dentistry News

MARCH 24, 2026

Organized Dentistry Coalition Urges CMS to Preserve Adult Dental Coverage Flexibility

The ADA-led Organized Dentistry Coalition warned that CMS's proposed 2027 ACA payment notice would reverse a 2025 policy change that had allowed states to add routine adult dental services to their essential health benefit benchmark plans beginning in plan year 2027. The coalition said the proposal would reduce flexibility for states, narrow coverage options for adults and weaken plan accountability. In practical terms, this is a reimbursement-and-regulation story: if CMS ultimately reinstates the prohibition, insurers, dental plans, state regulators and provider groups may all need to revisit plan design, exchange participation and advocacy strategies.

Source: ADA News

MARCH 17, 2026

ADA Pushes Federal Standards for Dental Imaging Interoperability

A bipartisan bill, the Improving Dental Administration Act, was introduced to make clear that state dental insurance reform laws apply to self-funded dental plans. ADA News says the measure is aimed at the more than 360 state dental insurance reform and patient-protection laws enacted over the last decade, and at what the ADA describes as a loophole under ERISA that lets some carriers argue they are not subject to those state rules. This is one of the clearest "legal work generators" in the period: if the bill advances, it could materially affect plan administration, reimbursement disputes, prompt-pay and prior-authorization rules, and state enforcement authority. Even without passage, it signals continued pressure to narrow ERISA-based defenses in dental benefits administration.

Source: ADA News

General Dentistry News (cont'd)

MARCH 12, 2026

Federal Bill Targets the ERISA “Self-Funded Plan” Gap in Dental Insurance Regulation

The ADA submitted comments to HHS and ONC arguing that dental imaging remains trapped in proprietary systems that do not reliably exchange data with electronic dental records or broader health IT systems. Its comments highlighted inconsistent use of DICOM standards, fragmented exchange pathways, missing metadata and the continuing reliance on manual transfer methods because dentistry was largely excluded from earlier federal health IT incentive programs. The ADA said poor interoperability can lead to degraded images, lost metadata, repeat imaging, administrative burden and avoidable radiation exposure; it urged open export standards, interoperable APIs, dental-specific certification criteria and inclusion of dental imaging data in the U.S. Core Data for Interoperability.

Source: ADA News

MARCH 05, 2026

Student-Loan and Workforce Policy Moved Closer to the Center of Dental Advocacy

On March 5, the ADA said it joined an ADEA-led coalition asking the U.S. Department of Education to slow or realign implementation of major federal student-loan changes tied to the “One Big Beautiful Bill Act,” including new repayment plans, revised loan limits for graduate/professional students and the phase-out of Graduate PLUS loans. Then, at the ADA Dentist and Student Lobby Day on March 22-24, student debt relief, dental insurance administration, and protection of federal oral-health infrastructure were elevated as core profession-wide priorities.

Source: ADA News

DSO Expansion & Consolidation

APRIL 01, 2026

DSO Deal Roundup—March 2026

Group Dentistry Now reported a series of DSO affiliation and expansion transactions completed or announced during March 2026. MB2 Dental added five affiliated practices across multiple states. Heartland Dental expanded through a combination of five de novo offices across five states and two additional affiliated practices. Beacon Oral Specialists entered the Jacksonville, Florida market through a partnership with North Florida Oral & Facial Surgery, adding five locations. Premier Care Dental Management expanded its footprint in Pennsylvania and added Toledo Periodontics in Ohio. The Smilist expanded into Virginia through an affiliation with Arlington Dental Team.

Source: Group Dentistry Now

DSO Expansion & Consolidation (cont'd)

MARCH 30, 2026

Female-Founded U.S. Dental Professionals to Triple National Footprint with 10 New Walmart-Based Practices

Group Dentistry Now reported that U.S. Dental Professionals planned to expand from five to fifteen locations during the first quarter of 2026. The expansion consisted of 10 additional practices located within Walmart stores across Texas and Florida. The company indicated that these locations are part of its ongoing retail-based model, where dental offices are co-located within Walmart properties.

Source: Group Dentistry Now

MARCH 17, 2026

PDS Health Founder Steve Thorne on the Rise of Predictive Dentistry and the Next Wave of DSOs

Group Dentistry Now reported comments from PDS Health founder Steve Thorne regarding the organization's scale and strategic direction. The article states that PDS Health supports more than 1,100 practices across 24 states. Thorne discussed the company's focus on integrating dental and medical care, including the use of diagnostic data and technology to support clinical decision-making.

Source: Group Dentistry Now

Other DSO News

MARCH 05, 2026

30 DSO Growth Trends Reshaping the Dental Industry in 2026

Clerri reported that the DSO market continues to expand rapidly, with the U.S. market reaching approximately \$37.9 billion in 2024 and projected to grow at a 17.9% CAGR through 2034. The article states that consolidation remains a defining feature of the industry, with nearly 200 DSO transactions occurring in 2024 and the largest DSOs collectively supporting thousands of offices. It also notes that DSOs are increasingly relying on technology, particularly AI-driven diagnostics, which has been associated with improved case acceptance rates. Other key trends include staffing shortages, with a large majority of practices reporting difficulty hiring hygienists, and a gradual shift away from traditional insurance dependence as DSOs explore alternative revenue models such as membership plans.

Source: Clerri

Private Equity

MARCH 31, 2026

BGL Announces Majority Recapitalization of Apex Dental Laboratory Group by LongueVue Capital

Brown Gibbons Lang & Company announced the majority recapitalization of Apex Dental Laboratory Group by LongueVue Capital, in partnership with Swaney Group Capital. The article notes that Apex has grown into a national dental laboratory platform with 16 labs across 10 states, supported by a strategy of de novo expansion and more than 20 acquisitions. It highlights Apex's focus on U.S.-based manufacturing and a diversified product portfolio that includes crowns, implants, dentures, pediatric products and digitally enabled offerings, such as 3Dprinted pediatric crowns. The transaction positions Apex for continued growth, with its existing management team remaining in place and industry veteran Billy Braun joining as Executive Chairman. Overall, the recapitalization reflects ongoing private equity interest in scaled dental services and laboratory platforms as consolidation and technology adoption continue across the dental value chain.

Source: MarketWatch

Partnerships and Innovation

MARCH 27, 2026

Clear Aligner Advisor and Smile Partners USA Create Strategic Partnership

Dentistry Today reported that Clear Aligner Advisor entered a strategic partnership with Smile Partners USA, a dental support organization with more than 120 practices nationwide. The article states that Clear Aligner Advisor is a dentist-led training and doctor development platform focused on clear aligner adoption. Following a pilot program, the partnership represents the company's largest transition from a pilot to a full enterprise rollout.

The collaboration involves deploying a structured system that includes education, implementation support and accountability frameworks designed to help associate dentists integrate clear aligner therapy into daily practice. The article notes that the initiative is intended to increase clinical production and improve long-term doctor retention by giving clinicians more consistent training and operational support. It also highlights that the partnership reflects broader demand among DSOs for implementation-focused systems that go beyond traditional education and instead drive measurable adoption of clear aligner treatments across multi-site organizations.

Source: Dentistry Today

Partnerships and Innovation (cont'd)

MARCH 20, 2026

Dentalcorp Launches First Annual Dental Technology Demo Day Offering \$100,000 Investment and Potential Pilot Opportunity

Group Dentistry Now reported that Dentalcorp launched a Dental Technology Demo Day that offers a \$100,000 investment and a potential pilot opportunity within its North American network of about 600 practices. The article says the initiative is aimed at startups working in AI, software and other dental technologies, giving them a venue to present solutions before judges and investors. The article presents the program as a structured way for a large dental organization to identify, fund and test emerging technologies inside a scaled operating environment.

Source: Group Dentistry Now

MARCH 16, 2026

DentistryIQ Recapped Several Products and Service Innovations Highlighted at Midwinter 2026

The article says Henry Schein One introduced Image Verify, a Dentrax and Dentrax Ascend-native capability that evaluates radiograph quality in real time at the moment of capture, helping teams catch blur, misalignment or missing coverage before claims are delayed or denied. It also highlights Premier Dental's preview of Multi-Match Flow Chameleon Antimicrobial Composite with BioArmor and references VoiceStack and a mobile dental clinic among the notable offerings discussed.

Source: DentistryIQ

MARCH 12, 2026

The Group Dentistry Now Show: The Voice of the DSO Industry – Episode 249

This March 12 episode focused on "Revolutionizing Dental Imaging: The PDS Health & SOTA Cloud Partnership." Group Dentistry Now reported that Mostafa Khairzada of PDS Health and Dustin Johnson of SOTA Cloud discussed their recent partnership and the use of cloud-based dental imaging technology. The article describes the partnership as part of a broader push toward digital imaging infrastructure that can support large-scale dental organizations more effectively than legacy systems.

Source: Group Dentistry Now

Litigation

MARCH 17, 2026

3 Convicted in Racketeering Conspiracy Involving Dental Practice

ADA News reported that three individuals tied to the Savani Group, a Pennsylvania dental-practice network, were convicted on March 9 in a racketeering conspiracy that defrauded Pennsylvania Medicaid of more than \$30 million. The convictions covered a wide range of conduct, including RICO conspiracy, health care fraud, visa fraud, obstruction of justice, money laundering, tax fraud, wire fraud and a conspiracy to violate the Food, Drug, and Cosmetic Act. ADA News said the scheme included filing false H-1B visa applications, billing healthcare benefit programs in the names of non-treating dentists, laundering fraud proceeds and using prototype dental implants labeled “Not For Human Use” in patients without their knowledge or consent. The defendants were awaiting sentencing in July 2026, with the Savani brothers facing statutory maximum prison terms exceeding 400 years.

Source: ADA News

MARCH 12, 2026

Action Against Delta Dental Heats Up Across U.S.: What Dentists Should Know

The California Dental Association reported that multiple lawsuits involving Delta Dental are continuing to move forward across the United States. The article highlights two key cases: a class-action lawsuit alleging that Delta Dental misrepresents out-of-network coverage to patients, and ongoing antitrust litigation involving provider reimbursement practices. The article notes that these cases focus on how reimbursement structures and network rules are communicated and applied, with potential implications for both providers and patients.

Source: California Dental Association (CDA)

Staffing

MARCH 09, 2026

New DSO and Dental Group Hires, Promotions & Awards Highlight Workforce Movement Trends for 2026

Group Dentistry Now reported a wide set of leadership and recruiting moves across DSOs and dental groups, presenting them as evidence of continued workforce movement across operations, education, recruiting and clinical leadership. The article notes that Heartland Dental added Luis Miguel Mata as vice president of operations, education and support services; Guardian Dentistry Partners promoted Howard Lindholm to senior director of clinical education; P1 Dental Partners added Cory Wahl as senior director of provider recruiting; Peak Dental Services named Tiffany Howerton vice president of operations and hygiene; and Appaloosa Dental Partners added both a chief operating officer and a vice president of integrations. The article frames these moves as part of broader personnel movement as organizations expand and professionals step into new roles.

Source: Group Dentistry Now

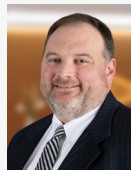
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