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## Welcome to CBG & Company, Inc.

A dental specific financial consulting firm.

### Our Services

- [Financial Planning](#)
- [Tax Preparation and Accounting](#)
- [Investment Advisory](#)
- [Transition Consulting](#)

### Here's How CBG Can Help You:

#### Emerging Dentists

- Establish long term financial goals

- Effectively manage cash flow and debt
- Develop sound financial principles for young professionals and families
- Begin to invest for the future
- Implement risk management strategies
- Evaluate practice purchase opportunities

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## **Established Dentists**

- Investment accumulation strategies
- Eliminate debt
- Pension plan design
- Minimize tax liabilities
- Goal setting and tracking
- Retirement income planning

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## **Exiting Dentists**

- Practice transition planning
- Post ownership cash flow
- Set appropriate investment risk
- Insurance risk management
- Estate analysis & legacy goals

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## **Financial Consulting Team**

### **The Principals**



[Jim Clark](#)

CPA, CFP®



[Roy Bodinus](#)

AIF, MBA



**Dan Garwood**

AAMS, MBA



## [Nick Catlin](#)

CPA, CFP®, MBA

[View All](#)

**Meet our trusted team of advisors who will work with you throughout your financial journey.**

## [Meet Our Team](#)

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