

The Successful Dentist™

Dental Tax and Finance

Deadlines & Misc.



ESTIMATED TAX

1st Quarter Estimated Tax Payments are due by April 15th

2026 EVENTS

- April 30: INDC in Spokane
- May 15: Washington AGD
- May 21: UW School of Dentistry
- May 28 & 29: PNDC in Seattle
- June 12: Camp CEO in Bellevue

REMINDERS

Income tax payments need to be made online. The IRS is no longer accepting checks. Refer to page 5 of this newsletter for more details.

Data security: please only send us sensitive financial documents through one of our secure upload methods (Canopy, Double, ShareFile, TaxCaddy).



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Helping Dentists Make Smart Financial Decisions

In this issue:

- Reminder on Estimated Tax Payments
- Our 2026 Financial & Payroll Survey
- Trump Accounts: What Families Need to Know
- Cyber Security: New Threats Targeting Small Businesses
- How Clients Use Best for Dentistry to Save Money on Operating Expenses

In addition to this newsletter, we have new tax planning & practice management articles posted on our website: [Dental Accounting Group Learning Library](#)

WE ARE ACCEPTING NEW CLIENTS!



Do you know any colleagues that could benefit from working with an expert dental accounting team? Please send them our way! Referrals are greatly appreciated.

Send inquiries to Kevin Bray:
Kevin@dentalaccountingpros.com or
Kevin@cpa4dds.com

<https://dentalaccountingpros.com/contact/>



Disclaimer: This newsletter is prepared by Dental Accounting Group (DAG) for general informational purposes only and does not constitute legal, tax, accounting, or investment advice. Information is based on sources believed to be reliable as of the publication date but may become outdated or superseded. Tax laws and regulations are subject to change. Individuals and businesses should consult with a qualified professional advisor regarding their specific circumstances before making any financial, tax, or legal decisions.

New! DAG Survey Dashboards Now Live

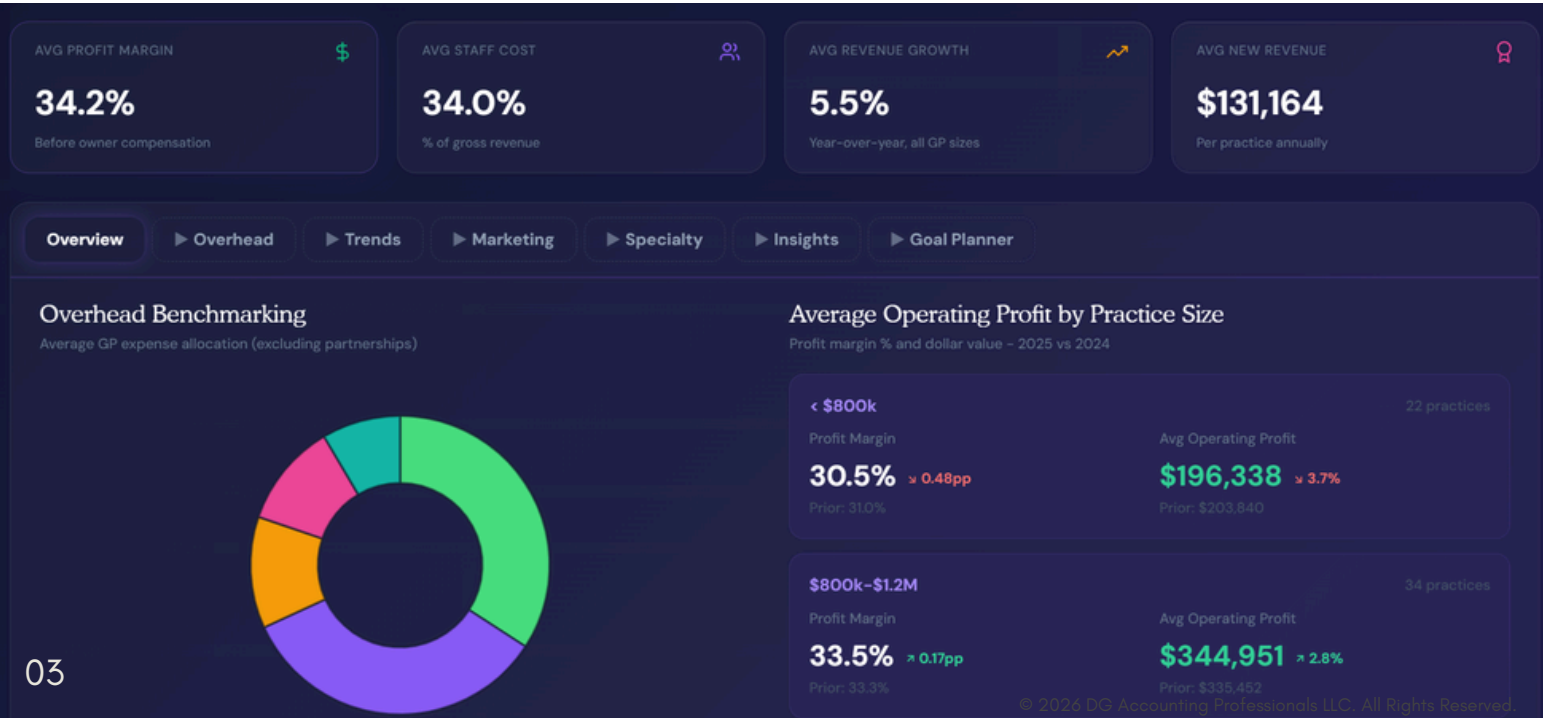
Dental Accounting Group is proud to announce the launch of two powerful new interactive dashboards built from our annual survey data.

Our comprehensive Financial Survey Dashboard puts decades of Washington State dental practice benchmarking data at your fingertips. Compare your practice overhead, production, and profitability against peers across general practice and specialty categories.

Access the dashboard:

dentalaccountingpros.com/dag-financial-survey-dashboard/

[Click Here to View the Financial Dashboard](#)



New! DAG Survey Dashboards Now Live

Dental Accounting Group is proud to announce the launch of two powerful new interactive dashboards built from our annual survey data.

Our Payroll Analytics Dashboard provides detailed compensation benchmarking for dental hygienists (RDH), dental assistants (DA), front office administrators, and office managers across the Greater Puget Sound and Washington State.

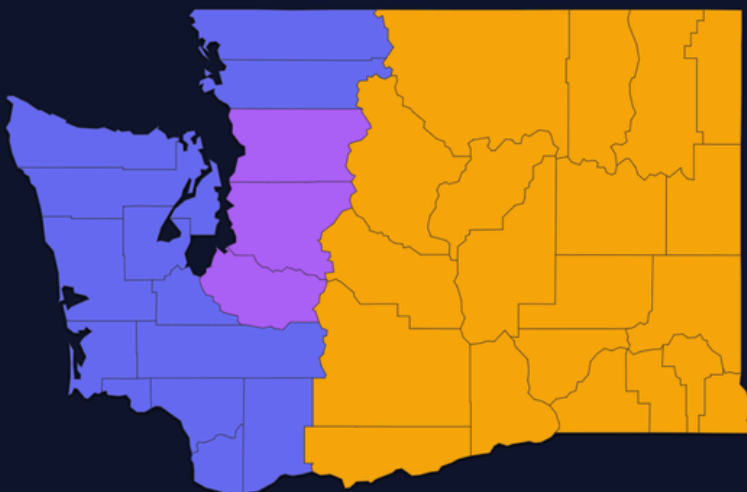
Access the dashboard:

dentalaccountingpros.com/dag-payroll-analytics-dashboard/

[Click Here to View the Payroll Dashboard](#)

Western vs Eastern Washington Wage Divide

Click a region to filter • Hover for region detail



■ Western WA Rural
 ■ Seattle Metro
 ■ Eastern WA

All Regions

Western WA

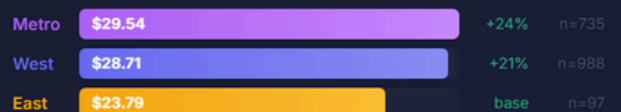
Seattle Metro

Eastern WA

Dental Hygienist



Dental Assistant



Front Office Admin



REMINDER

Estimated Tax

First Quarter Estimated Tax

Payments are **due by April 15th!**

INCOME TAX PAYMENTS NEED TO BE MADE ONLINE.
THE IRS IS **NO LONGER ACCEPTING PAPER CHECKS.**

DON'T FORGET

REFER TO THIS POST FOR MORE INFO ON HOW TO MAKE A PAYMENT:
[DENTALACCOUNTINGPROS.COM/IRS-TAX-PAYMENTS-USPS-
UPDATES/](https://DENTALACCOUNTINGPROS.COM/IRS-TAX-PAYMENTS-USPS-UPDATES/)



Discover the Official Podcast of the Academy of Dental CPAs:



Start listening today: <https://adcpa.org/podcasts/>

As a proud member of the Academy of Dental CPAs (ADCPA), Dental Accounting Group is committed to bringing you the best insights and resources in the dental industry. Together with ADCPA and Art Wiederman, we stand among the top thought leaders shaping the future of dental practice management and financial success.

Hosted by industry expert Art Wiederman, this podcast dives into topics that matter most to dental professionals, including:

- Smart budgeting and planning for your practice
- Metrics that drive profitability
- Strategies for growth and efficiency
- Insights from leading voices in dentistry and finance

Trump Accounts: A New Savings Tool for Families

The One Big Beautiful Bill Act, signed into law in 2025, introduced the Trump Account — a new tax-deferred savings vehicle designed to encourage long-term wealth building for qualifying children. Here is what dental practice owners and their families need to know.

Next Steps: What to Do Mid-Year

While Trump Accounts cannot be opened until July 4, 2026, now is the time to prepare:

- File Form 4547 with your personal tax return if your child was born between 2025 and 2028 to secure eligibility for the \$1,000 government contribution.
- Visit www.trumpaccounts.gov to register for email updates and receive notification when the portal is live.
- If you are an employer, evaluate whether to offer a Trump Account program as an employee benefit. This requires a separate written plan and must apply to all employees regardless of income or ownership status.
- Consult your DAG advisor to determine whether a Trump Account fits within your overall wealth transfer and tax planning strategy.

Disclaimer: Trump Account rules are still being finalized by the IRS and Treasury. Information in this article is based on the legislation as currently enacted and is subject to change. This is not legal or investment advice. Consult your DAG advisor for personalized guidance specific to your situation.

Trump Accounts: A New Savings Tool for Families

Account Type	Tax-deferred (similar to a traditional IRA, but specifically for children under age 18)
Who Can Open	Legal guardian, parent, adult sibling, or grandparent – in that order of priority
Opening Date	Accounts may be opened beginning July 4, 2026
Govt. Contribution	\$1,000 one-time pilot contribution for children born January 1, 2025 through December 31, 2028
Annual Limit	Up to \$5,000 per year combined from employers and individuals (no income limits for contributors)
Employer Portion	Up to \$2,500/year (inflation-adjusted after 2027); excludable from the employee's gross income
Deductible?	No. Individual contributions are non-deductible and are treated as gifts for gift tax purposes
Investments	Must be invested in low-risk U.S. index funds during the growth period (until the child reaches age 18)
Distributions	Follow traditional IRA rules after age 18; taxed as ordinary income above contributed basis
Penalty-Free Use	Education, first home purchase (up to \$10K lifetime), birth/adoption (up to \$5K), or age 59 1/2+

Cyber Security News



CRC Technologies collaborates with DAG to help keep our clients informed on the latest cyber threats. CRC provides managed IT services, backed by over two decades of industry experience, to over 375 dental practices across the Pacific Northwest.

Fake PDF Reader Scam: Make Your Office Admin Aware!

CRC is seeing an uptick in two common attack methods targeting small businesses: “free” PDF readers and malicious Excel files. In the first case, someone searches online for a PDF reader, converter, or “editor” and ends up downloading software that looks legitimate but is actually bundled with malware or spyware. These installers can add hidden background tools that track activity, steal passwords, or create a foothold for a larger compromise.

With Excel files, we’re seeing more documents designed to trick users into enabling risky features. These often arrive by email and look like routine spreadsheets labeled as invoices, statements, payroll, or reports, but then prompt you to “Enable Content” or “Enable Macros” to view the file properly. That prompt is a major red flag: macros can run code on your computer and are a common way attackers deliver malware. If an Excel file is asking to enable macros or is throwing a malware alert, stop and do not proceed.

CRC’s security protections are designed to detect and block these threats by scanning downloads and files and quarantining anything that matches known malicious patterns or behavior. If you see a malware alert, that means the protection worked. Do not click “allow,” “override,” or try to install a different “free” version to get around the warning.

Cyber Security News

Fake PDF Reader Scam: Make Your Office Admin Aware!

A practical tip: in many cases you don't need a "free PDF editor" at all. Modern browsers like Firefox can open a PDF and allow basic text entry and simple edits (and you can always use approved tools your IT team provides). Please avoid installing any free software from the internet unless it's explicitly approved, and do not open Excel files that trigger a warning or request macros. If something appears urgent but gets blocked, contact your IT support or CRC so we can validate it safely and provide an approved, secure option.

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1125 N 140th St Seattle WA 98133



“At CRC, we’re monitoring this issue closely. If you want a list of recommended protections and more info on spotting these scams, please contact us at help@crctechs.com”

Your security is our priority.
-James Cosgrove, CEO



DAG has not received financial benefits for endorsing CRC. They are our preferred vendor for dental practice IT services in Washington because they are the best at what they do - serving the unique needs of dental practices!

PARTNER SPOTLIGHT

Save More. Do More. Stay Independent.

As your trusted accounting partner, we are always looking for ways to help your practice reduce costs and operate more efficiently. That’s why we’re excited to highlight a partnership that’s already delivering real, measurable savings for independent dental practices — and comes with an exclusive offer for our clients.

What Is BEST for Dentistry?

BEST for Dentistry (Building Everyone’s Success Together) is a group purchasing and practice solutions network built specifically for independent dental practices. Its mission is simple: level the playing field against corporate dentistry by giving independent offices access to the same buying power, resources, and expertise that large DSO groups enjoy.

Premium membership provides access to:

- Dental Supplies & Equipment
- PPO Solutions
- Compliance Training
- Dental Labs
- Group Health Insurance
- Retirement Benefits
- Human Resources Support
- Tax & Financial Experts
- Patient Financing
- Payment Processing
- Practice Technology
- Front Office Solutions

What Are Practices Actually Saving?

Below is an anonymized breakdown of average savings per participating client, organized by solution category. Only practices actively using each solution are included in that category’s average.

Solution Category	Vendor Partner	Clients Using	Avg. Savings / Client	Year 1 Net*
Dental Supplies	Burkhart	10 of 16	\$27,213	\$27,213
Aligner Solutions	Spark	2 of 16	\$5,281	\$5,281
Compliance Trng.	Etactics	4 of 16	\$4,219	\$4,219
Implant Systems	Straumann	5 of 16	\$2,794	\$2,794

* Year 1 Net: DAG clients receive their first 12 months of membership free (promo code: DAG), so Year 1 savings equal gross savings with no membership fee deducted. Standard annual membership is \$2,189/yr (\$199/mo). Year 2+ net savings = Avg. Savings – \$2,189.

Overall Average — Per Active Client

Across all solution categories combined, here is what the average participating practice saved—before and after the annual membership fee.

Avg. Gross Savings / Client	Annual Membership Fee	Avg. NET Savings / Client
\$26,200 Active clients (12 of 16)	-\$2,189 After Year1 free trial	\$24,014 Year 2+ (after membership fee)

Note: Averages reflect 12 of 16 participating practices actively utilizing at least one BEST solution (CY2024–Q3 2025). Results will vary based on practice size, services used, and purchasing volume.

BEST
— for DENTISTRY



Building Everyone's Success Together

BEST for Dentistry provides solutions that level the playing field for independent dental practices to compete against corporate dentistry.

BECOME A MEMBER TODAY!



To take advantage of all the benefits BEST for Dentistry has to offer, sign up as a Premium Member and gain access to:

- Dental Supplies and Equipment
- PPO Solutions
- Practice Advisory
- Compliance Training
- Dental Labs
- Group Health Insurance
- Retirement Benefits
- Human Resources
- Tax and Financial Experts
- Patient Financing
- Payment Processing
- Sleep Dentistry
- Technology
- Membership Plans
- Front Office Solutions
- Dedicated Account Managers
- and much more!



Dental
Accounting
Group

Join our network of independent dental practices to boost profitability, streamline operations, and maintain autonomy—plus gain access to exclusive savings and expertise from our Dental Accounting Group to strengthen your financial performance.

Register Now

- Visit BESTforDentistry.com
- Click "JOIN NOW"
- Complete quick registration
- Select monthly payment option and enter code "**DAG**" to receive first 12 months free
- Our team will contact you to complete your onboarding

877-669-6320

 bestfordentistry.com

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