
DAVID B. MANDELL

CURRICULUM VITAE

AUTHOR, LECTURER & CONSULTANT

Tel: 877-656-4362
Fax: 866-913-4911

Education

UCLA School of Law
J.D., 1995

The Anderson Graduate School of Management at UCLA
M.B.A., 1995

Harvard University
B.A., History, 1990



Professional Designations/Licenses

California Bar Member (active)
New York Bar Member (inactive)
Life and Health Insurance Licensed in Florida

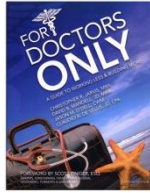
Experience

Principal, OJM Group, LLC
www.ojmgroup.com
Principal of firm that specializes in wealth preservation and asset management solutions for physicians, business owners and families.
2007-Present.

Author & Lecturer, Guardian Publishing, LLC
Co-Author of all Guardian's products, including **For Doctors Only**, all state versions of the book, the CME Monograph, **Risk Management for the Practicing Physician** and others.
1998-Present.

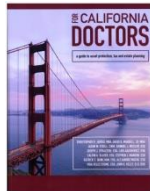
Attorney, Law Offices of David B. Mandell, P.C.
Sole shareholder and principal of law firm.
1996-Present

BOOKS BY MR. MANDELL



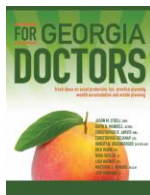
For Doctors Only: A Guide to Working Less & Building More

This book teaches doctors how to efficiently practice so they can get more out of a medical practice. More specifically, **For Doctors Only** helps doctors protect their personal and practice assets from lawsuits, taxes and bad investments while showing them the secrets to building wealth through the leverage of people, assets and effort. Published 2007, 2008, 2009, 2011 and 2013.



For California Doctors: A Guide to Asset Protection, Tax and Estate Planning

California- specific version of *For Doctors Only* book, Published 2009.



For Georgia Doctors: Fresh Ideas on Asset Protection, Tax, Practice Planning, Wealth Accumulation and Estate Planning

Georgia- specific version of *For Doctors Only* book, Published 2011.



For New York Doctors: A Guide to Asset Protection, Tax Reduction, Practice and Wealth Management

New York- specific version of *For Doctors Only* book, Published 2011.



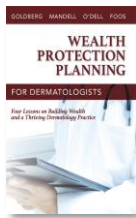
For Ohio Doctors: Shedding Light on Asset Protection, Tax and Estate Planning

Ohio- specific version of *For Doctors Only* book, Published 2010.



Wealth Protection Planning for Orthopaedic Surgeons and Sports Medicine Specialists

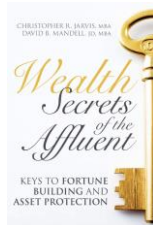
Written by OJM principals and well-known Orthopaedic surgeon Dr. Peter J. Millett, of the Steadman Clinic in Vail, CO and formerly of the Harvard Medical School, this short book focuses on four concise lessons that may have a significant impact on your practice efficiency and long- term financial well-being., Published 2013.



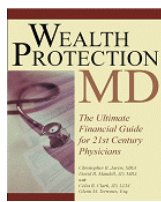
Written by OJM principals and practicing dermatologist, clinical professor and attorney David J. Goldberg, JD, MD, this short book focuses on four concise lessons that may have a significant impact on your practice efficiency and long- term financial well-being., Published 2015.



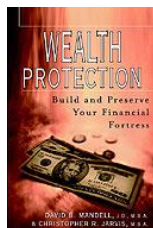
Risk Management for the Practicing Physician©, 1998, 2001, 2004, 2007, 2010, 2013. Guardian Publishing, LLC. Accredited for 5.5 hours of Category I Continuing Medical Education credits by ACCME.



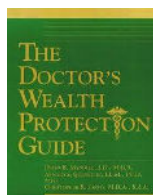
Wealth Secrets of the Affluent©, 2008. John Wiley & Sons. Insights and lessons on all areas of wealth and financial planning, from a unique perspective. Goes beyond “common sense” advice often ill-suited for people who have wealth or want to build wealth.



Wealth Protection, M.D.: The Ultimate Financial Guide for 21st Century Physicians, 2005. Guardian Publishing, LLC. A book for physicians, incorporating the Risk Factor Analysis and up-to-date recommendations on the medical malpractice crisis.



Wealth Protection: Build and Preserve Your Financial Fortress©, 2002. John Wiley & Sons. Offers a uniquely individualized view of financial planning. The Risk Factor Analysis turns your answers to 86 questions into a personally-tailored book by directing you to any number of the books 67 chapters.



The Doctor's Wealth Protection Guide©, 1998. Guardian Publishing, LLC Comprehensive financial & legal planning book, focused solely for physicians. Endorsed by Texas, Florida, Fairfield County (CT) Medical Associations. Favorably reviewed in Tennessee & West Virginia Medical Journals.

SPEAKING ENGAGEMENTS BY MR. MANDELL

National

Mastering the Business of Aesthetics

May 2014, New York: "Keep More of What You Make: Tax Reduction for The Aesthetic Practice"
Aug 2013, Chicago: "Wealth Protection for Today's Aesthetic Physician"
Jun 2013, Phoenix: "Wealth Protection for Today's Aesthetic Physician"
Apr 2013, New York: "Wealth Protection for Today's Aesthetic Physician"
Oct 2012: Beverly Hills: "Wealth Protection for Today's Aesthetic Physician"

American Academy of Aesthetic Medicine

Nov 2014, Las Vegas: "Protect What you Earn: Asset Protection for Aesthetic Physicians"
May 2014, Miami: "Protect What You Make: Best Practices in Asset Protection for the Aesthetic Practice and Aesthetic Physicians"

American Academy of Cosmetic Surgeons

Jan 2010, Orlando: "Tax, Asset Protection & Exit Strategies For Today's Surgeon"
Jan 2008, Orlando: "Wealth Protection Planning for Today's Cosmetic Surgeon"
Jan 2007, Phoenix: "Wealth Protection Planning for Today's Cosmetic Surgeon"

American Academy of Dermatology

Oct 2006, Boston: "Wealth Protection Planning" and "Qualified & Non-Qualified Plans"
March 2016, Washington, DC: "Legal Aspects of Dermatology"

American Academy of Facial Plastic & Reconstructive Surgery

Oct 2013, New Orleans: "Corporate Structure and Tax Reduction"

American Academy of Ophthalmology

Oct 2010, Chicago: "Asset Protection, Tax & Estate Planning for Today's Ophthalmologist"
Nov 2006, Las Vegas: "Asset Protection, Tax & Estate Planning for Today's Ophthalmologist"
Oct 2005, Chicago: "Asset Protection, Tax & Estate Planning for Today's Ophthalmologist"
Oct 2004, New Orleans: "Asset Protection, Tax & Estate Planning for Today's Ophthalmologist"

American Association of Neurological Surgeons

Apr 2011, Denver: "Wealth Protection Planning for Neurological Surgeons"
Apr 2005, New Orleans: "Wealth Protection Planning for Neurological Surgeons"
Apr 2004, New Orleans: "Wealth Protection Planning for Neurological Surgeons"

American Association of Orthopedic Executives

Apr 2013, San Diego: "Best Practices in Asset Protection for Orthopaedic Practices & Orthopaedic Physicians"
May 2010, Anaheim: "Corporate Structure, Tax & Benefit Planning for Today's Orthopedic Practice"

American College of Mohs Surgery

Apr 2011, Las Vegas: "Advanced Asset Protection, Tax & Estate Planning for Today's Mohs Surgeon"
Apr 2009, Austin: "Advanced Asset Protection, Tax & Estate Planning for Today's Mohs Surgeon"

American Educational Institute

July 2015, Detroit: "Reducing Physician Financial Stress: Best Practices in Corporate Structure and Tax Reduction"
July 2014, Detroit: "Protect More of What you Make: Practice and Personal Asset Protection Planning"
July 2013, Detroit: "Reducing Financial Stress in the Medical Practice"
July 2012, Detroit: "Asset Protection, Tax & Estate Planning"
Jun 2011, Detroit: "Corporate Structure & Asset Protection Planning"

American Med Spa Association

Sep 2014, Philadelphia: "Keep More of What You Earn: Best Practices in Corporate Structure, Tax Reduction and Benefit Planning for Medical Spas"

American Medical Women's Association

Nov 1999, San Francisco: "Asset Protection for the Female Physician"

American Orthopaedic Association

June 2016, Seattle: "Wealth Protection, Tax Strategies, and Planned Giving for Orthopaedic Surgeons"

American Society for Aesthetic Plastic Surgery

Apr 2006, Orlando: "Advanced Topics in Wealth Protection Planning"

American Society of Ophthalmic Plastic & Reconstructive Surgery

Jun 2010, Aspen: "Asset Protection for ASOPRS Physicians & Their Families – Securing Your Financial Future"

American Society of Plastic Surgeons

Oct 2006, San Francisco: "Asset Protection, Tax & Estate Planning"

Oct 2005, Chicago: "Asset Protection, Tax & Estate Planning"

Oct 2004, Philadelphia: "Asset Protection, Tax & Estate Planning"

Business of Medicine CME Conference

Oct 2013, Philadelphia: "Keep More of What You Make: Best Practices in Corporate Structure and Benefit Planning for Physicians"

Feb 2013, Philadelphia: "Corporate Structure and Tax Reduction for Medical Practice", "Best Practices in Practice & Personal Asset Protection Planning", "How Healthy is Your Portfolio? Traditional and Alternative Investment Strategies for Physicians"

June 2012, San Diego: "Risk Management for the Practicing Physician," "Best Practices in Personal and Practice Asset Protection Planning," "Best Practices in Corporate Structure & Benefit Planning"

Indian-American Medical Symposium

Jan 2006, Ocala: "Wealth Protection Planning"

International College of Integrated Medicine

March 2013, DC: "Corporate Structure & Tax Reduction for Integrative Medical Practices"

International College of Surgeons

Jul 2005, Acapulco: "Advanced Asset Protection Planning"

Jun 2000, Boston: "Advanced Financial & Investment Strategies for Surgeons"

International Knee Meeting

Oct 2015, Las Vegas: "A Secure Surgeon is a Better Surgeon"

Orthopaedic Summit

Dec 2015, Las Vegas: "5 Keys to Wealth Planning for Young Orthopaedists"

Dec 2014, Las Vegas: "How to Save Money on Taxes Whether in Private Practice or Employed"

Physicians Business Academy

Jul 2011, Atlanta: "Corporate Structure, Tax & Asset Protection Planning"

May 2011, Las Vegas: "Corporate Structure, Tax & Asset Protection Planning"

Feb 2011, Atlanta: "Keep More of What You Make"

Society of Clinical Research Sites

Oct 2015, Sea Island, GA: "Working Smart and Building More: Best Practices in Corporate Structure, Tax Reduction & Wealth Protection"

Spa Management Conference

Jan 2014, Hawaii: "Keep More of What You Make: Best Practices in Corporate Structure, Tax Reduction and Benefit Planning for Medical Spas" and "Protect More of What You Make: Best Practices in Practice and Personal Asset Protection for Spa Owners"

State & Regional

American College of Cardiologists Ohio Section

Oct 2010, Columbus: "Thriving in A Difficult Financial Environment: Corporate Structure & Tax Efficiency for Today's Cardiology"

American Society of Anesthesiologists

Jul 2009, Chevy Chase: Maryland & Washington D.C. Chapters: "Tax & Asset Protection Planning"

Georgia/South Carolina Societies of Accredited Surgery Centers (GSASC/SCASC)

Mar 2010, Atlanta: "Corporate Structure, Tax & Benefit Planning for Ambulatory Surgery Centers: How to Get the Most Out of Your ASC"

Georgia Academy of Family Physicians

Nov 2011, Georgia: "Thriving in a Difficult Economic Environment: Corporate Structure and Tax Planning for the 2011 Physician"

Georgia Independent Physician Association

Apr 2009, Columbus

Georgia Society of Ambulatory Surgery Centers

Feb 2010, Atlanta

Georgia Society of Anesthesiologists

Jul 2008, Hilton Head: "Asset Protection Strategies for Today's Anesthesiologist" & "Retirement and Practice Exit Strategies for Today's Anesthesiologist"

Georgia Society of Family Practice Physicians

Nov 2011, Atlanta: "Corporate Structure, Asset Protection and Tax Reduction for Medical Practices"

Georgia Society of General Surgery

Feb 2010, Atlanta: "Thriving in A Difficult Financial Environment: Corporate Structure & Tax Efficiency for Today's Surgeon"

Louisiana Orthopedic Association

March 2016, New Orleans: "How LOA Families Can Better Build and Protect Wealth For Retirement and Beyond"

Massachusetts Ophthalmology Meeting

May 2005, Newton: "Asset Protection, Tax and Estate Planning for Today's Ophthalmologist"

Multi-Specialty Foundation's Facial Aesthetic Surgery Meeting

Jun 2009, "Advanced Asset Protection, Tax, and Corporate Planning for Today's Cosmetic Surgeon"

New England Society of Plastic & Reconstructive Surgeons

Oct 2005, Mystic: "Asset Protection, Tax and Estate Planning for Today's Physician"

New England Orthopedic Society

Nov 2011, Boston "Asset Protection & Tax Planning for Orthopedic Physicians"

New Jersey Society of Plastic Surgeons

Apr 2006, New Brunswick: "Asset Protection Planning"

New York Society of Ophthalmology

Oct 2006, New York: "Asset Protection, Tax and Estate Planning for Today's Ophthalmologist"

New York County Medical Society

June 2013, New York: "Keep More of What You Make: Best Practices in Corporate Structure and Benefit Planning for New York Physicians"

North Shore Physicians Organization

Sept 2013, "4th Quarter Tax Tips for New York Practices"

Apr 2012, Long Island: "Corporate Structure, Asset Protection, and Tax Reduction of Medical Practices"

Odyssey Dental Meeting

January 2015: San Antonio: "Best Practices in Corporate Structure, Tax Reduction & Benefit Planning"

Ohio Society of Pathologists

Oct 2010, Columbus: "Corporate Structure & Tax Planning in Light of Healthcare Reform for Today's Physician"

Optimum Healthcare Independent Physician Association

Mar 2010, "Practice & Personal Asset Protection Planning for Today's Physician"

OrthoGeorgia

Nov 2014, Macon: "Keep and Protect More of What You Make: Best Practices in Tax Reduction and Asset Protection for OrthoGA Physicians"

Piedmont Hospital

March 2013, Georgia: "Best Ideas In Tax Reduction for Physicians & Practices in 2013"

May 2012, Georgia: "Thriving in a Difficult Economic Environment: Corporate Structure and Tax Reduction for the 2012 Physician"

Riverhills Neuroscience

Feb 2013, Cincinnati: "The Fiscal Cliff Deal: The Good, Bad and Ugly for Taxpayers"

SCISI Annual Conference

Sept 2009, "Asset Protection Planning for Florida Physicians"

Sacramento Plastic Surgery Society

Sep 2010, Sacramento

Tift Regional Medical Center

Nov 2011, Tifton: "Thriving in a Difficult Economic Environment: Corporate Structure and Tax Planning for the 2011 Physician"

Travis County Medical Society

March 2015, Webinar: "Ideas to reduce 2015 taxes for TCMS Physicians"

MR. MANDELL HAS WRITTEN FOR THE FOLLOWING PUBLICATIONS

AADOM Insights (American Association of Dental Office Managers)

AAEDEP Advisor (American Academy of Disability Evaluating Physicians)

AANS Bulletin (American Association of Neurological Surgeons)

AAOE ENews (American Association of Orthopaedic Executives)

AAOMS Today (American Association of Oral & Maxillofacial Surgeons)

AAOS Now (American Academy of Orthopaedic Surgeons)

ACOMS Review (American College of Oral & Maxillofacial Surgeons)

ASBP News (American Society of Bariatric Physicians)

AOA This Week (American Orthopaedic Association)

ASC Communications

ASD Update (Academy of Sports Dentistry)

ASTA NewsBrief (American Society of Transplant Surgeons)

About Face: Specialty News (American Association of Facial Plastic & Reconstructive Surgery)

American Academy of Otolaryngology

American Academy of Plastic Surgery

American Gastroenterological Association

American Medical News (American Medical Association)

American Psychiatry News

Aesthetic Society News (American Society for Aesthetic Plastic Surgery)

American Urological Association News

Anesthesia Malpractice Prevention

ASTRO

Bryn Mawr Communications (*Practical Dermatology, Practical Neurology, Modern Aesthetics, Glaucoma Today, New Retina MD, New Derm MD*)

Business of Medicine (American Society of Cataract & Refractive Surgery)

Cardiology Today

CDS Review
Chiropractic Economics
CUA Weekly Update (California Urology Association)
Cosmetic Surgery News Brief (American Association of Cosmetic Surgery)
Dermatology Times
 e-News Weekly (Academy of Osseointegration)
Entrepreneur MD
Foot & Ankle Weekly (American College of Foot & Ankle Orthopedics & Medicine)
Getting Paid (Kareo blog)
Implant Insight (American Academy of Implant Dentistry)
Insights (Western Occupational & Environmental Medical Association)
Insights (Western Society of Periodontology)
 International College of Surgeons
 MD News
Medical Economics
 Medical Group Management
 Medical Justice Blog
 Med Esthetics Magazine
 Medscape (Money & Medicine section)
 MultiBriefs
 Executive Briefings:
 Anesthesiologist Chiropractic
 Dental Gastroenterology
 Ophthalmology Orthopedic Surgeon
 Otolaryngology Urology
NCPTAToday (North Carolina Physical Therapy Association)
 Neonatal Intensive Care
 Nephrology News & Issues
 Neuropractice
 O&P Business News
 Oncology & Hematology
 Ophthalmology Management
 Ophthalmology Times
 Orthopedics Today
PAGD ON THE MOVE (Pennsylvania Academy of General Dentistry)
 Patient Care
 Pain Medicine
 Physician's Money Digest
 Physician's News Digest
 Physician Practice Options
 Podiatry Today
Practice Link
Private Practice Section eNews (American Physical Therapy Association-Private Practice)
 Radiologic Technology
RadOne Weekly (American College of Radiation Oncology)
 Review of Ophthalmology
 RT Image
 Aslu.net
 Skin & Aging
 Society for Invasive Cardiovascular Professionals
 Society of Thoracic Surgeons
 Spa Management
 Spine Biz & Beyond
 Strategic Orthopedics
 SurgiStrategies
TNP News Flash (Texas Nurse Practitioners)
This Week in Family Practice (Association of Family Practice Physicians Assistants)
This Week in Perio (American Academy of Periodontology)
 UO Works
 Urgent Care Access (Urgent Care Association of America)
 Urology Times
WARFIELD Weekly Update (Society of Dermatology SkinCare Specialists)

Regional Publications

Bexar Cty Medical Soc (TX)	News of New York
Charlotte County Medical Soc	NY Academy of Family Physicians
Capital Medical Soc (FL)	<i>NY Sight</i> (NY State Ophthalmological Soc)
Chicago Dental Soc (IL)	Pinellas County (FL) Medical Soc
Dade Cty Medical Soc (FL)	Polk County (FL) Medical Soc
Collier Cty Medical Soc (FL)	Pulaski County Medical Society
Dallas Cty Medical Soc (TX)	<i>San Antonio Medicine</i> (Bexar Cty Med Assoc)
<i>EOA News</i> (Eastern Orthopedic Assoc)	Sarasota Cty Medical Soc (FL)
Escambia Cty Medical Soc (FL)	<i>Sierra Sacramento Medicine</i> (CA)
Florida Medical Assoc	St. Claire County Medical Soc
Florida Medical Business	<i>Tennessee Medicine</i> (TN Medical Assoc)
Florida Orthopedic Soc	<i>Texas Medicine</i>
Fresno-Madera Medical Soc (CA)	Texas Orthopedic Assoc
Lane County Medical Society (OR)	<i>The Physician Executive</i>
Monterey County Medical Soc	<i>Tibia Tribune</i> (Southern Orthopedic Assoc)
Monroe County Medical Soc	Travis County Medical Society
New Jersey Medicine	<i>Western Orthopedic Assoc News</i>
<i>News Capsule</i> (Fairfield Cty Med Assoc, CT)	Westchester County Medical Soc (CT)
New York County Medical Society	Wichita Falls Magazine
New York Regional Soc of Plastic Surgeons	Wyoming Medical Society
New York Soc of Anesthesiology	

RADIO & TELEVISION APPEARANCES

Interviewed by over 50 radio shows on personal finance, including:

ReachMD Radio	KYW 1060AM	WKHM 970AM	KKSM 1320AM
Bloomberg Business Radio	WYSR 570AM	KSFR 90.7FM	WDTR 90.9FM
WABJ 1490AM	WCUB 980AM	WPTT 1360AM	KSWN 93.9FM
Business Talk Radio	KSRK 540AM	KOA 850AM	WPTT 1360AM
WGVU AM/FM	KPQ 560AM	KGAB 650AM	WBNW 1120AM
WFHR 1320AM	WAIF 88.3FM	KCBR 1040AM	WFRX 1300AM

Appeared on FOX-TV in New York on "Good Day New York" Dec 2002

Appeared on BLOOMBERG TV on "Bloomberg Personal Finance" Jan 2003