

# Great Oak Investment Management Execs Join Dental Protection Group Board to Drive Financial Innovation in Dentistry

NEW YORK, NY, UNITED STATES, June 22, 2025 /EINPresswire.com/ -- The [Dental Protection Group](#) (DPG), a pioneering company focused on providing dental procedure warranties and wealth-building strategies through 831(b) reinsurance structures, is proud to announce that Jesse F. Brookreson, CRC® and Brian Trymbiski, AIF®, of [Great Oak Investment Management of Raymond James](#) will be working to bring their financial expertise to dental industry.



With over a decade of experience in captive and reinsurance company investment management, the Great Oak team has worked extensively with businesses across multiple industries to help structure and manage their long-term financial strategies. Their depth of expertise will help guide DPG's mission to bring innovative and tax-advantaged financial solutions to dental practices and labs across the country.

"We are excited to work with such talented individuals and a reputable and financially stable organization as Raymond James & Associates," said Max Zanan, co-founder of the Dental Protection Group. "Brian and Jesse bring a level of institutional credibility and strategic vision that will be invaluable to our clients as we continue to grow."

Jesse F. Brookreson and Brian Trymbiski are part of the leadership team at Great Oak Investment Management of Raymond James where they are experienced in designing customized investment strategies for captive insurance and reinsurance companies.

Their alignment with DPG creates a powerful force; industry-leading financial experience and a fast-growing dental-focused platform.

"Great Oak is excited to bring time-tested wealth building strategies to the dental industry," said

Jesse Brookreson. “We believe in the strategies and solutions that DPG provides, and we’re proud to align with dentists and lab owners as they manage their risk and build financial security through smart planning and structured reinsurance.”

To learn more about Dental Protection Group, visit: [www.dentalprotectiongroup.com](http://www.dentalprotectiongroup.com).

To learn more about Great Oak Investment Management, visit:

<https://www.raymondjames.com/greatoakim/>

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#### About Dental Protection Group

Dental Protection Group helps dental practices and labs grow by offering dental procedure and prosthetic warranties backed by innovative financial structures such as 831(b) micro-captives. DPG is committed to helping providers attract more patients, increase treatment plan acceptance, and build generational wealth.

#### About Great Oak Investment Management of Raymond James:

Great Oak Investment Management is a dedicated advisory team under the Raymond James umbrella, known for delivering highly personalized wealth management strategies to business owners, professionals, and multi-generational families. Based in New York and backed by the national strength of Raymond James, Great Oak blends traditional investment discipline with forward-thinking financial planning.

#### Disclosures

The foregoing information has been obtained from sources considered to be reliable, but we do not guarantee that it is accurate or complete, it is not a statement of all available data necessary for making an investment decision, and it does not constitute a recommendation. Any opinions are those of Great Oak Investment Management and not necessarily those of Raymond James. Investing involves risks and investors may incur a profit or a loss.

Raymond James is not affiliated with and does not endorse the opinions or services of Dental Protection Group

Max Zanan

Dental Protection Group

[max@dentalprotectiongroup.com](mailto:max@dentalprotectiongroup.com)

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