

Tim McNeely Wins 2025 Nifty Thrifty Award for 'Favorite Financial Services' Provider

Tim McNeely, founder of Dental Wealth Nation, has been voted the 2025 "Favorite Financial Services" provider by the Nifty Thrifty Dentists community.

ORLANDO, FL, UNITED STATES, January 23, 2026 /EINPresswire.com/ -- Leading financial strategist and founder of [Dental Wealth Nation](#), Tim McNeely, has been named the 2025 "Favorite Financial Services" provider by the influential [Nifty Thrifty Dentists](#) community. This peer-voted honor was announced in the December 2025 issue of Dental Lifestyles Magazine and officially celebrated at Dental Podfest on January 15, 2026, hosted at the Renaissance Orlando at Sea World.



Tim McNeely (right), founder of Dental Wealth Nation, receives the 2025 Nifty Thrifty Award for "Favorite Financial Services" Provider at Dental Podfest in Orlando, presented by Dr. Glenn Vo (left), founder of Nifty Thrifty Dentists.

McNeely has served the dental profession since 2001 and is widely known for his expertise in exit architecture, helping dental entrepreneurs navigate seven- and eight-figure practice transitions. By coordinating tax, legal, investment, and estate planning across multiple advisors,

McNeely helps dentists capture their full potential when exiting or scaling their practices.

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Tim McNeely

"This recognition belongs to the clients who let me walk with them through complexity and transition," said McNeely. "My work has always been about helping great builders harvest what they've built—wisely and well."

As a CFP®, CIMA®, CEPA®, and CPFA®, McNeely brings deep credentials and industry insight to a space often marked by fragmented financial advice. Research from CEG Insights, a firm McNeely has on retain, shows that 95.7% of business

owners focus on maximizing pre-sale company value, 91% neglect to coordinate personal wealth strategies before closing. Combined with the fact that only 6.8% of financial advisors proactively offer advanced planning, practice sellers routinely surrender hundreds of thousands—sometimes millions—to preventable tax liabilities and missed planning opportunities.

McNeely combats this with his Virtual Family Office model, a unique framework designed to provide dental entrepreneurs with fully coordinated financial planning that goes beyond investment management. His platform supports dentists who are ready to transition ownership while preserving legacy and maximizing post-sale wealth.

"We're proud to support Tim as he continues to elevate the financial wellbeing of dental professionals," said Dr. Catrise Austin, spokesperson for Celebrity Branding LLC. "His recognition is a reflection of trust, expertise, and an unwavering commitment to the dental community."

McNeely also hosts the Dental Wealth Nation Show podcast and is author of Dental Wealth Nation, a strategic guide for dental professionals planning major exits. His message is simple: "Dental entrepreneurs planning \$10M+ exits don't need more advisors—they need a Personal CFO."

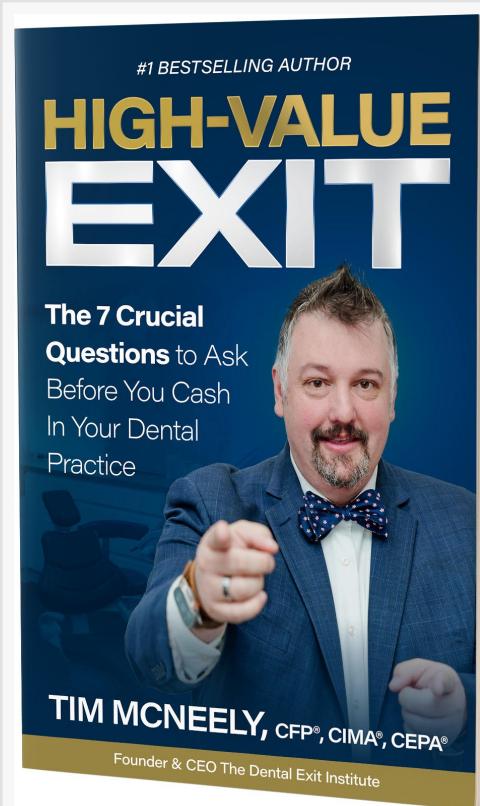
Ready to Maximize Your Exit?

Dental professionals considering high-value practice transitions are encouraged to [schedule a discovery call](#) with Tim McNeely to explore personalized financial coordination and join the growing Dental Wealth Nation community.

Learn more at: www.timmcneely.com

About Tim McNeely

Tim McNeely, CFP®, CIMA®, CEPA®, CPFA®, is a Private Wealth Strategist and founder of The LifeStone Companies, specializing in coordinated financial planning and exit strategy for dental entrepreneurs navigating high-value practice transitions. He leads The LifeStone Institute and Dental Wealth Nation—a suite of platforms dedicated to helping dental professionals reduce



"High-Value Exit" by Tim McNeely, CFP®, CIMA®, CEPA®, offers dentists a strategic guide to selling their practice with maximum value. As Founder of The Dental Exit Institute, McNeely shares the seven crucial questions to ask before a dental practice transition.

advisor fragmentation, optimize valuations, and build enduring wealth. Through his Virtual Family Office model, podcast, and published works, Tim equips practice owners with the clarity, confidence, and coordination needed to turn successful practices into generational legacies.

About Celebrity Branding LLC

Celebrity Branding is a personal brand strategy firm founded by Celebrity Dentist Dr. Catrise Austin, helping entrepreneurs like Tim McNeely amplify their impact through strategic visibility and expert positioning.

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