

Special Topic Forum – VIRTUAL

VIRTUAL

DATE AND TIME

Tuesday, February 3, 2026
6:30pm – 7:30pm

- Session will be recorded for attendees' use.
- The recording will be available approximately 2 weeks following.
- PDUs will be entered into your OTAC account. (Be sure to complete the post-event questionnaire to be eligible for PDUs.)

REGISTER BY
Monday, February 2, 2026

Register Online
[HERE](#)

QUESTIONS?

Contact OTAC staff:
Email staff@otaonline.org
Call toll-free (888) 686-3225



Financial Literacy for Therapy Professionals (1 PDU)

Presenters Swati Shah, OTR/L, and Rakesh Shah, MHA, Co-Founders, Ascend Rehab Services, Inc.

After completing this session, participants will be able to:

- Recognize the role of long-term financial planning and risk management in supporting ethical practice, professional longevity, and overall occupational well-being; and
- Apply fundamental financial management strategies, including budgeting and student loan considerations to support personal financial stability.

Registration Fees:

Members - \$19

Nonmembers - \$29



Swati Shah, OTR/L, is an occupational therapy practitioner with over 28 years of diverse experience in pediatric and inpatient care. She is the director and founder of Ascend Rehab Services, Inc., a multidisciplinary pediatric therapy organization serving children across California in various settings, including home-based, EI, outpatient, school systems, and clinic-based services.



She works closely with her co-founder and husband, **Rakesh Shah, MHA**, who leads the administrative functions of Ascend, including strategy and marketing, human resources, information technology, facilities/product/-service area expansion, and supporting the founder with day-to-day operations. Shah has over 30 years of experience as a health care executive, including 17 years as executive director of compliance at Kaiser.

Financial Literacy for Therapy Professionals (1 PDU)

ABOUT SPECIAL TOPIC FORUMS

Why OTAC Special Topic Forums? To support OTAC Core Value 7 – Professional Development: To provide quality education and resources to advance the knowledge, skills, and continued competence of occupational therapy practitioners.

To earn PDUs. Registrants must complete the post event questionnaire that is emailed out within one week following the event.

Tracking PDUs. PDUs earned are recorded in registrant's OTAC account.

Event Disclaimer.

This event is sponsored by OTAC for the purpose of professional development. The material presented is not intended to represent the only or the best methods appropriate for the occupational therapy and/or medical condition, or professional development issues being discussed, but rather is intended to present the opinions of the presenters, which may be helpful to other health care professionals at arriving at their own conclusions and consequent application. Attendees participating in this professional development education program do so with the full knowledge that they waive any claim they may have against OTAC and its representatives for reliance on any information presented during this educational event.

[Click here for OTAC's complete disclaimer/terms. You must agree to these disclaimers/terms. Please don't register if you do not.](#)

About OTAC. OTAC is a nonprofit, 501c6. This means that end-of-year net revenue is retained for operations and benefit of the members and is not distributed to private owners. It is governed by an elected, noncompensated Board of Directors and hires a professional association management team.

OTAC Mission Statement. OTAC is the collective voice that serves, promotes, and supports the profession of occupational therapy and its practitioners.

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