# Dental Practice Success Plan

Jones & Roth
CPAs & Business Advisors

*Advisory Services for Maximizing Practice Success*

## Proactive Advisory Perspective

The big dental chains have the benefit of a full financial management team, analyzing profit and key performance indicators. In order to compete, independent dental practices need to gain the same deep insight into the success metrics that drive profitability.

The dental practices that work with our advisors can expect us to provide a proactive, forward-looking advisory perspective. Rather than simply providing year-end tax preparation, our goal is to contribute value throughout the year that results in superior practice and personal financial management.

Think of us as your outsourced financial management team. We provide a wide range of services that will ensure your practice remains competitive.

## Communication: The Key to Success

We stay in close communication with you throughout the year to make sure you always know what's coming up next and what we need from you. CPAs are notorious for failing to communicate or anticipate your needs. We don't adopt that approach. We're committed to consistent communication, and you'll never wonder about next steps or when our next meeting is.

In addition to year-round communication, our team provides quarterly meetings to provide guidance throughout the year. These meetings give our clients the chance to look back, assess the current situation, plan ahead, and get advice on the issues that matter most to their success.

## A GOOD FIT?

Our clients:

1. Aspire to have a clear financial vision and plan for their practice
2. Want to achieve an outstanding return on their investment by focusing on strategic practice financial management
3. Want to maximize the financial opportunity of their practice
4. Want to maximize their retirement plan and personal financial success.

## Advisory Meeting Schedule

| Q1 Jan-Mar | Q2 Apr-Jun | Q3 Jul-Sep | Q4 Oct-Dec |
|---|---|---|---|
| Tax Return & Goal Setting | Key Performance Indicators & Benchmarking | Retirement Planning | Fee Analysis & Tax Planning Opportunities |

TOP WORK PLACES 2019 The Oregonian OREGONLIVE

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www.jrcpa.com

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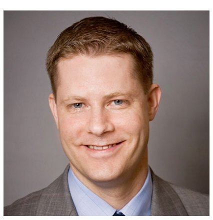
| Practice Success Plan | Bookkeeping Health Assessment | QuickBooks Accounting | Retirement Plan Services |
|---|---|---|---|
| Quarterly Goal Setting | Chart of Accounts Assessment | Key Performance Indicators Dashboard | Third-Party Administration |
| Quarterly Review of Financial Statements | Reconciliation Reports Assessment | Reconciliation of the banking and credit card accounts | Custom Plan Design & Plan Document |
| Quarterly Projections & Estimates | Asset & Equity Accounts Review | Verifying and entering the Principal and Interest splits for loan payments | Contribution Projections & Tax Planning |
| Benchmarking & Key Performance Indicators Analysis & Review | Liabilities Review | Payroll Allocation for Staff, Hygiene, and Assistant | Year-Long Consulting |
| Tax Return for Dental Practice | Profit & Loss Assessment | Entering of the depreciation and amortization | Compliance |
| Personal Budget & Debt Management Review | Payroll Assessment | Review / analysis of the general ledger | |
| Retirement Plan Contribution Review | Benefits Assessment | Financial information reports provided to client | |
| Family Employment & College Savings Strategy | Retirement Accounts Assessment | | |
| Fee Analysis & Optimization | | | |

## Jones & Roth Dental Team

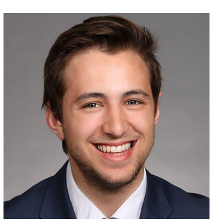
***Jeremy Prickel, CPA****
*Partner & Shareholder*



***Mark Reynolds, CPA****
*Partner & Shareholder*

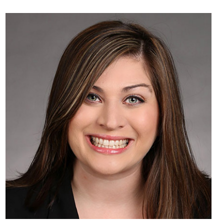
***Elliott Tracy, CPA****
*Senior Manager*

***Danny Richârd***
*Senior Accountant*



***Chance Hendrickson***
*Staff Accountant*

***Lorie Toepfer***
*Accounting Specialist*



***Ashley Miller***
*Executive Assistant*

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