

Practice Success Plan

Multi-Owner Healthcare Practices



Financial & Operational Advisory for Providers & their Practices

Our comprehensive suite of services is designed for medical practices owned by a group of providers seeking to maximize operational and financial performance. Clients expect us to provide a proactive, forward-looking advisory perspective. Rather than simply providing year-end tax preparation, we contribute value throughout the year that results in superior financial management. We also support practice owners in their personal tax, retirement planning, and financial management success.

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. We focus on staying in touch with quarterly meetings, which 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.

Your Healthcare Finance Team

Our advisory role includes work as a remote finance team to fill the gap with executive level business management expertise. We also provide Practice Managers and Executive Teams with specialized financial management expertise that strategically supports the success of the entire team. Our services dovetail around your management team's expertise and capabilities.

Example of Quarterly Meeting Schedule

Q1 Jan-Mar Tax Return & Goal Setting	Q2 Apr-Jun Benchmarking & Revenue Cycle Management	Q3 Jul-Sep Retirement Plan Design & Planning	Q4 Oct-Dec Physician Goal Setting & Strategic Planning
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A GOOD FIT?

OUR CLIENTS VALUE:

1

Proactive Engagement

A proactive and engaged relationship with their Practice Advisor

2

Excellence & Openness

A practice culture that strives for excellence and is open to utilize new strategies

3

A Team Environment

A team environment where each individual's contribution is valued and contributes to the success of the practice

4

Clarity & Accuracy

Clear and accurate financial performance reporting

5

Peace of Mind

A peace of mind that comes from knowing that they are operating a practice with a strategic plan guided by a qualified Practice Advisor

The Right People Beside You.

> jr CPA.com

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SUCCESS PLAN SERVICES INCLUDE:



Strategic Planning & Consulting

A strategic financial partner to help the owners develop and implement a long term vision for success



Retirement Plan Design & Management

An integrated tax and retirement plan strategy to optimize contributions and minimize tax obligations.



Practice Benchmarking

Insight into your practice's overall health compared to other local medical practices and industry metrics. Analysis of performance and recommendations on specific actions for improvement.



Tax Consulting & Compliance

A team of CPAs experienced in the medical clinic industry, who understand multi-owner practice dynamics and bring proactive advisory expertise.

ADDITIONAL SERVICES:

Compensation Analysis

Utilizing national and local compensation benchmarks to structure equitable compensation agreements.

Practice Value Planning & Strategy

Practice value assessments for managing, transferring equity, buying, or selling a practice

Revenue Cycle Optimization, Coding Review, RVU Analysis

Revenue cycle expertise for optimized revenue management based on owners' goals and opportunities. Includes contract assessment and negotiation and fee structure analysis & optimization.

Real Estate Services

Buy, sell, lease, feasibility analysis, cash flow analysis, cost segregation and real estate strategy

JONES & ROTH HEALTHCARE TEAM:



*Nicole McOmber, CPA**
Partner & Shareholder



*Jeremy Prickel, CPA**
Partner & Shareholder



*Brian Newton, CPA**
Partner & Shareholder



*Elliott Tracy, CPA**
Partner



Mark Reynolds
Partner & Shareholder



Ashley Miller
Executive Assistant

Our Team...

- Provides accounting, tax planning, retirement planning, and practice advisory services – all under one roof
- Consists of Practice Advisors who have specific knowledge of medical practice operations and financial management and partnership strategy
- Has designed specialized guidance to support the achievement of your unique practice and personal goals

Our Clients...

- Want to establish and maintain a successful, profitable medical practice
- Aspire to have a clear financial vision and plan in place for their practice
- Seek alignment between owners of financial management goals and policies for their practice
- Believe that focusing on strategic financial management will bring an outstanding return on investment
- Want to create an equitable and enjoyable relationship between practice owners