

# Practice Success Plan

Single-Owner Healthcare Practices

## Financial & Operational Advisory for Providers & their Practice

Our comprehensive suite of services is designed for medical practices owned by a single provider who is seeking to maximize operational and financial performance. We 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, estate planning, and financial management success.

## Communication: The Key to Success

We stay in close communication throughout the year to make sure that our action plan is always clear. Staying in touch with quarterly meetings and regular communication gives practice owners 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 support practice management decision making. We work with practice owners and administrators to provide specialized financial management expertise that strategically supports the success of the practice.

### Example of Quarterly Meeting Schedule

<b>Q1</b> Jan-Mar Tax Return & Goal Setting	<b>Q2</b> Apr-Jun Benchmarking & Revenue Cycle Management	<b>Q3</b> Jul-Sep Retirement Plan Review & Strategy	<b>Q4</b> Oct-Dec Goal Setting & Tax 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 Collaborative Approach

Support and guidance for the entire practice management team

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.**

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Hillsboro, OR 97124  
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## SUCCESS PLAN SERVICES INCLUDE:



### Strategic Planning & Consulting

A strategic financial partner to help develop and implement a long-term vision for success.



### Retirement Plan Review & Strategy

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



### Practice Benchmarking

Insight into a 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 and advisors experienced in the medical clinic industry, who understand single-owner practice dynamics and bring proactive advisory expertise.

## ADDITIONAL SERVICES:

### Revenue Cycle Optimization

Revenue cycle expertise for optimized revenue management based on your goals and opportunities.

### Practice Assessment Planning & Strategy

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

### Bookkeeping & Accounting

Accounting and bookkeeping reconciliation support services.

### Estate Planning Services

Accounting, tax planning, financial planning, investment advice, and insurance analysis.

### Real Estate Services

Transaction analysis, cash flow analysis, cost segregation, and real estate tax strategy.

### Practice Startup Services

An advisory engagement to support a successful practice acquisition or practice startup.

## JONES & ROTH HEALTHCARE TEAM:



*Nicole McOmber, CPA\**  
Partner & Shareholder



*Jeremy Prickel, CPA\**  
Partner & Shareholder



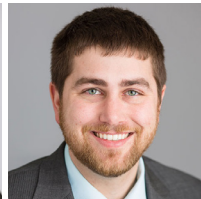
*Brian Newton, CPA\**  
Partner & Shareholder



*Elliott Tracy, CPA\**  
Partner



*Jordan Dawley, CPA\**  
Manager



*Keegan O'Brien, CPA\**  
Senior Accountant



*Rebecca Donathan*  
Customer Success  
Coordinator

### Our Team...

- Provides accounting, tax planning, retirement planning, estate planning, and practice advisory services – all under one roof.
- Has specific knowledge of medical practice operations and financial management.
- 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.
- Believe that focusing on strategic financial management will bring an outstanding return on investment.
- Want to solve issues getting in the way of enjoying their practice.