Practice Success Plan

Multi-Owner Healthcare Practices

Jones Roth
Healthcare CPAs & Advisors

Financial & Operational Advisory for Providers & their Practice

Our comprehensive suite of services is designed for medical practices owned by a group of providers 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 supports effective financial management. We also support practice owners in their personal tax, retirement planning, and financial management success.

Your Healthcare Finance Team

Our advisory role includes work as a remote finance team to support practice management decision making. We also provide practice administrators with specialized financial management expertise that strategically supports the success of the entire team. Our services dovetail around the practice management team's expertise and capabilities.

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.

A GOOD FIT?

OUR CLIENTS VALUE:

Proactive Engagement
A proactive and engaged relationship with their Practice Advisor

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

A Collaborative Approach
Support and guidance for the entire practice management team

Clarity & Accuracy
Clear and accurate financial benchmarking performance reporting

Confidence
Confidence that comes from knowing they are operating a practice with a strategic plan guided by a qualified Practice Advisor

Example of Quarterly Meeting Schedule

Q1 Jan-Mar	Q2 Apr-Jun	Q3 Jul-Sep	Q4 Oct-Dec
Tax Return & Goal Setting	Benchmarking & Revenue Cycle Managmement	Retirement Plan Review & Strategy	Goal Setting & Tax Planning

Learn More About Our Team:

The Right People Beside You.

> jrcpa.com

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phone (541) 382–3590
fax (541) 382–3587

EUGENE 260 Country Club Road, Suite 100, Eugene, OR 97401
phone (541) 687–2320
fax (541) 485–0960

HILLSBORO 6723 NE Bennett St., Suite 220, Hillsboro, OR 97124
phone (503) 648–0521
fax (503) 648–2692

SUCCESS PLAN SERVICES INCLUDE:

Strategic Planning & Consulting

A strategic planner to help practice owners develop and implement a long term vision for success.

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.

Retirement Plan Review & Strategy

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

Tax Consulting & Compliance

A team of CPAs and Healthcare advisors 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.

Compensation Plan Management
Design, review, and practice owner distribution guidance.

Revenue Cycle Optimization
Revenue cycle expertise for optimized revenue management based on owners' goals and opportunities.

Strategic Project Implementation
Practice management transitions, transferring equity, buying/selling a practice, special tax policy strategies.

Real Estate Services
Transaction analysis, cash flow analysis, cost segregation, real estate tax strategy, and facility planning.

Customized Retirement Plan Solutions
Third-Party Administration (TPA) services, compliance, custom plan design and plan document, and year-round consulting.

Integrated Financial Planning for Practice Owners
Tax planning, financial planning, investment advice, insurance analysis, and estate & trust services.

JONES & ROTH HEALTHCARE TEAM:



Nicole McOmber, CPA* *Partner*

Jeremy Prickel, CPA* *Partner*

Brian Newton, CPA* *Partner*

Jordan Dawley, CPA* *Partner*

Keegan O'Brien, CPA *Manager*

Rebecca Donathan *Client Success Coordinator*

Our Team...

- Provides accounting, tax planning, retirement planning, and practice advisory services – all under one roof.
- Has specific knowledge of medical practice operations, 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 goals and policies for their practice.
- Believe that focusing on strategic financial management can help support their long term goals.
- Want to create an equitable and enjoyable relationship between practice owners.

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