

Dental Practice Success Plan

Advisory Services for Maximizing Practice Success

Proactive Advisory Perspective

The most successful dental practices have a comprehensive financial management plan in place that insures that practice performance and personal financial goals are achieved.

The dental practices that work with Jones & Roth 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. The Practice Success Plan provides a wide range of services in the essential areas of accounting, tax, practice performance and retirement planning that will ensure your practice achieves financial management excellence and that you maximize your personal financial opportunity.

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 and failing to anticipate your needs. We don't adopt that approach. The Practice Success Plan provides consistent communication, you'll never wonder about next steps or when our next meeting is.

The Practice Success Plan includes a schedule of quarterly meetings with a specific agenda 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.

Advisory Meeting Schedule

Q1 Jan-Mar

Tax Return & Goal Setting

Q2 Apr-Jun

Key Performance Indicators
& Benchmarking

Q3 Jul-Sep

Retirement Planning

Q4 Oct-Dec

Fee Analysis & Tax
Planning Opportunities

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.

Dental Practice Success Plan

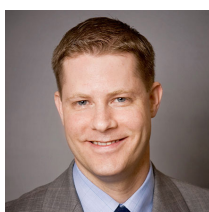
Advisory Services for Maximizing Practice Success

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			

The Jones & Roth Dental Team



Jeremy Prickel, CPA*
Partner



Mark Reynolds, CPA*
Partner



Brian Newton, CPA*
Partner



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*Securities offered through Avantax Investment ServicesSM, Member FINRA, SIPC. Investment advisory services offered through Avantax Advisory ServicesSM. Insurance services offered through an Avantax affiliated insurance agency.