Practice Success Plan

Single-Owner Healthcare Practices

JonesRoth CPAs & Business Advisors

Financial & Operational Advisory for Providers & their Practices

Our comprehensive suite of services is designed for medical practices owned by a single provider who is 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 work with Practice Owners and Practice Managers to provide specialized financial management expertise that strategically supports the success of the management team.

Example of Quarterly Meeting Schedule

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

A GOOD FIT?

OUR CLIENTS VALUE:

❶ **Proactive Engagement**
A proactive and engaged relationship with their Practice Advisor

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

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

❹ **Clarity & Accuracy**
Clear and accurate financial performance reporting

❺ **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

BEND 300 SW Columbia Street, Suite 201, Bend, OR 97702, 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 5635 NE Elam Young Pkwy. Suite 100, Hillsboro, OR 97124, phone (503) 648-0521, fax (503) 648-2692

SUCCESS PLAN SERVICES INCLUDE:

Strategic Planning & Consulting

A strategic financial partner to help you 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 your 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 single-owner practice dynamics and bring proactive advisory expertise.

ADDITIONAL SERVICES:

Revenue Cycle Optimization, Coding Review, RVU Analysis
Revenue cycle expertise for optimized revenue management based on your goals and opportunities. Includes contract assessment and negotiation and fee structure analysis & optimization.

Practice Value Planning & Strategy
Practice value assessments for managing, transferring equity, buying, or selling a practice

Real Estate Services
Buy, sell, lease, feasibility analysis, cash flow analysis, cost segregation, real estate strategy

Bookkeeping & Accounting
Monthly accounting and bookkeeping reconciliation services

Practice Startup Services
An advisory engagement to support a successful practice acquisition or practice startup

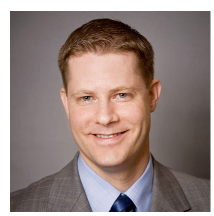
JONES & ROTH HEALTHCARE TEAM:

Nicole McOmber, CPA*
Partner & Shareholder

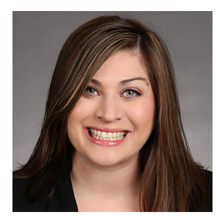
Jeremy Prickel, CPA*
Partner & Shareholder

Brian Newton, CPA*
Partner & Shareholder

Elliott Tracy, CPA*
Partner



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 solve issues getting in the way of enjoying their practice