Practice Success Plan

Single-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 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.

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.

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.

Example of Quarterly Meeting Schedule

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

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

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 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 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.

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.

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

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

Bookkeeping & Accounting
Accounting and bookkeeping reconciliation support services.

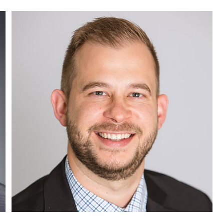
Practice Startup Services
An advisory engagement to support a successful practice acquisition or practice startup.

JONES & ROTH HEALTHCARE TEAM:

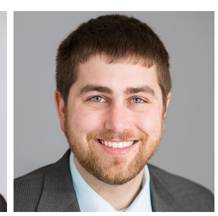
Nicole McOmber, CPA*
Partner & Shareholder

Jeremy Prickel, CPA*
Partner & Shareholder

Brian Newton, CPA*
Partner & Shareholder



Jordan Dawley, CPA*
Senior Manager



Keegan O'Brien, CPA*
Manager

Rebecca Donathan
Client 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.