



HEALTHCARE

The Healthcare Industry is made up of a wide variety of business and organizations that, at their core, all share one goal – to serve patients.

We understand your daily operations may include:

Patient Care

- » Treating the Sick
- » Building Practices
- » Prescribing Medications

Administrative and Communication Tasks

- » Scheduling Appointments
- » Communicating with Private Equity Firms
- » Filing Paperwork

Financial & Transactional Responsibilities

- » Processing Payments
- » Meeting with Donors

Our mission is to protect your time by handling your current accounting and consulting needs and advising proactively on future requirements so that you can focus on what matters – providing care for patients.

WHO WE WORK WITH



Executive &
Ownership Teams



Investment
Banks



Private Equity
Leadership



Lenders

HOW WE CAN HELP

By drawing on our extensive team of audit, tax and consulting professionals, we are equipped to serve companies ranging from startups to accelerated filers with the Securities Exchange Commission (SEC).

We provide solutions by executing:

Assurance & Advisory Solutions

- » Stakeholder or Banking Required Audits
- » Pre-sell Consults

Outsourced Accounting Solutions

- » Monthly Accounting Functions
 - » Bank Reconciliation
 - » Process Accounts Payable
 - » Expense Reporting Management
 - » Month-end Close
- » Assessment & Selection of Various Accounting Technologies
- » System Implementation & Managed Support Services
- » Tax Compliance
- » Financial Reporting Including Metrics and KPI's
- » Fractional or Outsourced Controller & CFO Services
- » Cash Flow Forecasting
- » Cash Balance Plans
- » Budget Planning

Tax & Compliance Planning Solutions

- » Federal & State income tax return preparation and planning Healthcare structures that include:
 - » Professional Associations
 - » Professional Limited Liability Companies
 - » Limited Liability Partnerships
 - » Corporations and S-Corporations
 - » Nonprofit Medical Organizations

HOW WE CAN HELP (CONTINUED)

Additional Solutions

- » Defined Employee Benefit Plans
- » Retirement Plan Design & Asset Management
- » Stock Option Planning
- » Profit Sharing Plans
- » Safe-harbor 401-K
- » Physician Wealth Management (Visit www.wpwealth.com to learn more.)
- » HIPAA and SOC II + HITRUST solutions

Whitley Penn has an extensive team of audit, tax, consulting, and valuation professionals that we draw upon as needed. We are service oriented and will do everything possible to guide your organization towards success.

CONTACT US



Josh Agren, CPA
Audit Partner

Josh.Agren@whitleypenn.com
817.259.9270



Jon Karp, CPA, PFS
Tax Partner

Jon.Karp@whitleypenn.com
214.393.9400



Daniel Boarder, CPA
Deal Advisory Partner

Daniel.Boarder@whitleypenn.com
469.776.3616