



2011 Consultants Workshop Retreat

Location: Offices of FGMK, LLC
2801 Lakeside Drive, 3rd Floor
Bannockburn, IL 60015

Day 1 - 10.27.11

7.30 AM – 8 AM Breakfast - Provided

8 AM – 9 AM Introduction & Statistical Analysis & Comparison / Benchmarking 101 & Metrics
NSCHBC) Charlotte L. Kohler, [RN], CPA, CVA, CPAM, CPC, CHBC

9AM – 12.30 PM Physician Compensation Plan – Duration – 3.5 Hours

Facilitator - Karen S. Schechter, RHIA, MBA, CCS-P

- Review Models that get you in trouble and those that don't.
- Everybody bring some models.
- Compare & Contrast NSCHBC, MGMA, RVU's, & Collections Methodologies (Common Problems & Pitfalls)
- Review Two or Three Models....

Take Away - Checklist and a variety of models

12.30PM – 1.30PM Lunch Break – Provided

1.30 PM – 5PM Physician Compensation Valuation – Duration 3.5 Hours

Facilitators - Charlotte L. Kohler, [RN], CPA, CVA, CPAM, CPC, CHBC & Judith N. Aburmishan, MBA, CPA, CHBC

- Bring Some Examples & Different Use of Statistics In Physician Comp Valuation
- General Overview of Physician Valuation Issues & Hospital Valuation Issues
- Review the Standard Report, Different Valuation Approaches and How They Are Calculated
- Review Critical Issues & Group Critique of Examples

Take Away – Checklist for developing a valuation



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Day 2 - 10.28.11

7.30 AM – 8 AM Breakfast - Provided

8 AM – 11 AM Evaluating & Critiquing a Medical Practice Valuation – Duration – 3.0 Hours

Facilitator – Jay Sanders, CPA, MST, CHBC, CVA

- How To's in analyzing and critiquing a Medical Practice Valuation
- Bring examples of problems you encountered when preparing a valuation

Take Away – Checklist for developing a valuation

11.00 – 11.15 Break

11.15 – 12.30 Introduction & Tax Issues With Medical Practice Sales
Howard Stone, CPA, J.D., Partner, FGMK, LLC

12.30PM – 1.30PM Lunch Break - Provided

1.30 PM – 5:00 PM I Physician / Hospital Integration – Duration – 3.5 Hours

Facilitator - Reed Tinsley, CPA, CVA, CFP, CHBC

- Scenario Review
- Group Think and Group Exercise

Deliverable – Consolidated Master Checklist