PRACTICE PROFILE

PRACTICE: GENERAL

S.G.R., INC.

ADDRESS

P.O. BOX 1020
CAREFREE, AZ 85377

CONTACT INFO

PHONE: 928.275-1326 FAX: 480.488.7824
EMAIL: CONTACT@SAMREADER.COM

GENERAL INFORMATION

A. Clinic Name: _____

B. Owners Name: _____

C. Clinic Street Address: _____

D. City, State, Zip: _____

E. Cell Phone: (_____) _____ **Email:** _____

F. Years in Practice _____ **At This Location**_____

G.

DC'S_____**MD'S**_____**DO'S**_____**PT'S**_____**LMT'S**_____**STAFF**_____**L.Ac.'S**_____

_

H. Porp'ship_____ **Part' ship**_____ **"S" Corp**_____ **"C" Corp** _____ **PA**_____

I. Straight: _____ **Mixer:**_____

J. Treatment Technique_____

Primary: _____

Secondary: _____

Other: _____

K. How many patients files on hand?_____

L. Total new patients last year:_____

M. Last years average charges per visit:_____

N.. Office Statistics:

(1) Usable square feet_____ **Owned**_____ **Leased** _____**Lease Amount $**_____

(2) Patient parking spaces:_____

(3) Free standing or multi-tenant:_____

(4) Location: _____

(5) Signage: _____

(6) Additional DC capability: _____

O. Does Acupuncturist own other clinics?

_____**Number**_____

P. Attach complete listing of fees for services provided.

Q. Clinic Hours_____

RATE YOUR OFFICE

CIRCLE ONE

	Poor				**Excellent**
How well equipped is your clinic?	**1**	**2**	**3**	**4**	**5**
Do you have enough space in your clinic?	**1**	**2**	**3**	**4**	**5**
Is your clinic easy to find?	**1**	**2**	**3**	**4**	**5**
Is your clinic on a busy street?	**1**	**2**	**3**	**4**	**5**
Is your clinic well marked?	**1**	**2**	**3**	**4**	**5**
Is your clinic visible?	**1**	**2**	**3**	**4**	**5**
Is your clinic accessible?	**1**	**2**	**3**	**4**	**5**

Does your clinic have adequate parking? **1 2 3 4 5**

STAFF

NOTE: If your spouse, relatives, or any special people work for you, please indicate their relationship when filling out the information below.

Name_____Length of Employment_____

Monthly Pay _____Bonus Pay_____

Salary_____ Hourly _____Contract Labor_____

Special Conditions_____

General Duties_____

_____

Hours Required to Work_____

L.Ac.'s Personal Evaluation Poor 1 2 3 4 5 6 7 8 9 10 Excellent

Name_____Length of Employment_____

Monthly Pay _____Bonus Pay_____

Salary_____ Hourly _____Contract Labor_____

Special Conditions_____

General Duties_____

_____

Hours Required to Work_____

L.Ac.'s Personal Evaluation Poor 1 2 3 4 5 6 7 8 9 10 Excellent

STAFF - CONTINUED

NOTE: If your spouse, relatives, or any special people work for you, please indicate their relationship when filling out the information below

Name_____Length of Employment_____

Monthly Pay _____Bonus Pay_____

Salary_____ Hourly _____Contract Labor_____

Special Conditions_____

General Duties_____

_____

Hours Required to Work_____

L.Ac.'s Personal Evaluation Poor 1 2 3 4 5 6 7 8 9 10 Excellent

A. Gross Billing: . . . . . .2020_____2021_____2022_____

B. Gross Receipts: . . . . . 2020_____2021_____2022_____

C. Overhead: . . . . . 2020_____2021_____2022_____

<u>NOTE:</u> Exclude all depreciation charges and all expenditures for Acupuncturist salary, bonus and fringe benefits (i.e. automobile, dues, and memberships, life-health-disability insurance, retirement plan contributions, etc.)

D. HMO/PPO Groups currently working with:

E. Approximate dollar amount collected from the HMO/PPO groups last year:

F. Attorneys:

G. Legal Networkers:

H. Specialized Referrals from other sources:

I. <u>ACCOUNTS RECEIVABLE:</u>

1. <u>Present Balance:</u> $_____

2. <u>Aging Schedule</u>

Current	**$_____**	**91 – 120**	**$_____**
31 - 60	**$_____**	**121 - 120**	**$_____**
61 - 90	**$_____**	**181 Plus**	**$_____**

3. **Receivable Profile:**

Patients Direct Pay.....$_____

Private Insurance.....$_____

Workman's Comp.....$_____

HMO/PPO (by carrier).....$_____

Personal Injury.....$_____

Medicare/Medicaid.....$_____

Other.....$_____

J. CLINIC NET ASSETS:.....$_____

NOTE: Include only those assets owned or leased by the clinic. Land at cost, building net of accumulated depreciation, and furniture, fixtures, equipment, leasehold improvement and capitalized leases net of accumulated depreciation. Exclude cash, marketable securities (if any) and accounts receivable.

STATISTICAL SUMMARY 2023

Please list your practice statistics for the last 12 months

Month/Year	Collections	Services	New Patients	Total Visits
12 Month Totals				

S.G. READER & ASSOCIATES, INC. USE ONLY

COLLECTIONS RATIO	CASE AVERAGE	VISIT AVERAGE	NEW PATIENT AVERAGE	RETENTION RATIO

HMO/PPO COLLECTIONS REPORT

If you are an HMO/PPO provider, please complete the following information. If you do not have exact figures, please estimate, but be as accurate as possible. This form will be presented to qualified prospective purchasers and their advisors.

AMOUNTED COLLECTED

NAME OF PROVIDER	YEAR
PHCS	
BEECH ST.	
BLUE CHOICE	
ASHN	
AMERICA WHOLE HEALTH NETWORK	
CCN	
HNA	
CIPA	
OMNI	
CHPA	
SPN	
FCA	

PHN	
IHP	
CHPS	
AETNA	
AFFORDABLE	
ANTHEM	
CAPP-CARE	
AHP	

NOTE: If any of your figures are an estimate, please place "est." after each amount.

K. Assumable Liabilities:.....$_____

NOTE: Include only those liabilities selling Acupuncturist expects buying party to assume.

L. Lease Obligations:

1. List all equipment, automobiles, data processing, office space, and any other assets leased by the practice/clinic.

ITEM	MONTHLY LEASE PAYMENT	LEASE TERM

M. <u>EQUIPMENT</u>

A. Rate your present equipment:

Excellent_____Good_____Needs Replacement_____

B. List each major piece of equipment you use in your practice (i.e. adjusting tables, ultra sound, x-ray, etc.)

ROOM:_____ PAGE_____OF_____

Qty	Year or Age	DESCRIPTION (Include Make, Model & Mfgr.)	Serial Number For Items over $500	Own	Lease	Original Value

PRACTICE DOCTOR

N. <u>ACUPUNCTURIST BACKGROUND</u>

1. Acupuncturist College/Year_____

_____

2. Post Acupuncturist College educations_____

_____

_____

_____

Acupuncturist Observation

Practice

What do you see as the strongest two areas in your practice?

A._____

_____

B._____

_____

What do you see as the weakest two areas in your practice?

A._____

_____

B._____

Acupuncturist Observation Continued

Personal

What do you see as your two strongest attributes as they relate to your practice?

A._____
_____
_____

B._____
_____
_____

What do you see as your two weakest attributes as they relate to your practice?

A._____
_____
_____B._____
_____
_____

Miscellaneous
Observations:_____
_____
_____