

**CV OF KEITH CARSTEN BORGLUM,  
Certified Healthcare Business Consultant (CHBC),  
Certified Business Broker (CBB) 2003-2018  
Candidate for Certified Business Appraiser (CBA)**

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**WEBSITES:** MedicalPracticeManagement.com  
MedicalPracticeAppraisal.com



**CURRENT ACTIVITIES:**

Practice startups, management & marketing consultant to almost 1,000 healthcare practices and businesses since 1983  
Licensed broker & appraiser of healthcare practices since 1981, state Lic CA#00767129 and FL BK3206346  
Faculty on medical practice business issues for state & national health care associations, and corporate medical sponsors  
Author and expert-resource for state & national medical periodicals and books  
Editorial Consultant & Contributing Author, *Medical Economics Magazine* –the leading national medical business journal– since 1990s

**HONORS, MEMBERSHIPS & FACULTY:**

Certified (CHBC), National Society of Certified Healthcare Business Consultants; Various Committees Chair & member & faculty; 2006-current  
Sole recipient, *2004 Godfrey Gourley President's Award*, the highest honor of the National Association of Healthcare Consultants  
Director & Faculty, National Association of Healthcare Consultants; Marketing Committee Chairman; Faculty, (merged NSCHBC 2006)  
Member, American Medical Association's (AMA) ConsultantLink™ consultant panel 1993-2005 (disbanded)  
Member, American Academy of Family Physicians (AAFP) Network of Consultants *FP-Assist*™ (Founding Member) 1993-current  
Member, American College of Physicians (ACP) Managed Care Professional Advisory Network™ (disbanded 1998)  
Member, American College of Physicians (ACP/ASIM) Professional Advisory Network Online Experts Panel (disbanded 1998)  
Member, American Academy of Ophthalmology Executives' (AAOE) Consultant Directory 2002-current  
Consultant, American Osteopathic Association (AOA), Division of Socioeconomic Affairs, 2011  
Member, California Academy of Family Physicians (CAFP) Corporate Advisory Council; Tech Committee 1990s  
Member, California Academy of Family Physicians Consultant Panel; early 1990s-current  
Member, Society of Medical-Dental Management (SMD) Consultants; National Special Projects Committee 1990-94  
Trustee, California Academy of Family Physicians Foundation (CAFP-F); Nominating Committee, two terms 1998-2004  
Founding Member, Academy of Dental Management Consultants 1983-1990  
Founding Member, *FP Consultants on Call* endorsed by the California Academy of Family Physicians (CAFP) 1990s-current  
Faculty, American Academy of Dermatology (AAD): Practice Management Symposium for Residents, Practice Management Courses 1998-2010  
Faculty, American Academy of Ophthalmology (AAO): 2009, annual invitee  
Faculty, Sponsored by Steifel/Connetics Laboratories: Dermatology Practice Management Seminars 2006-7  
Faculty, Sponsored by Reliant/Fraxel at the American College of Obstetrics and Gynecology (ACOG), 2007  
Faculty, Sponsored by Astra Pharmaceuticals at American College of Physicians (ACP), 1999  
Faculty, Sponsored by Aesculap at American College of Surgeons (ACS), 1999  
Faculty, American Academy of Family Physicians (AAFP) Scientific Assembly 2000-2008  
Faculty, American Academy of Allergy, Asthma and Immunology (AAAAI): Practice Management Workshops 2004-current  
Faculty, American Osteopathic Association (AOA) Practice Management Symposium 2002  
Faculty, California Academy of Family Physicians (CAFP-R), Residents and Students Conference, 2003-current  
Faculty, Western Section of the American Urological Association (AUA) Socioeconomic Conference 2006  
Faculty, American Educational Institute, AMA Category 1 PRA CME, 2006-7  
Faculty & Advisory Board, Oakstone Publishing CME provider 2008  
Faculty, Bankers' National Trust Closely Held Business Association Conference sponsored by Wells Fargo Bank, 2011  
Faculty for AchievMed.com, online physician education programs, endorsed by MGMA and other medical organizations 2003-4  
Affiliate, Medical Group Management Association (MGMA), California MGMA, NorCalMGMA 1984-current  
Member, Professional Association of Health Care Office Managers (PAHCOM) 1992-2003  
Member, The Physician Relations Group; Nominating Committee 1994  
Member, Institute of Business Appraisers (IBA), CBA Candidate 1994-current  
Member, National Association of Certified Valuators and Analysts (NACVA) – current  
Member California Association of Business Brokers (CABB, Certified CBB 2003-2018) – current  
Member, National IPA (NIPA) Coalition 1997-2001  
Member, The Independent Physicians' Association of America (TIPAA) 1994-2001; Board Director, California Chapter 1999-2000  
Member, National Board of Editorial Advisors of *Physician's Marketing and Management, Practice Personnel Bulletin, Eye Care Management Update* (Medical Economics specialty publications), and *The Health Care Practitioner* 1990s-2000s  
Industry Expert in Medical Practice Valuation, Business Brokerage Press "*Business Reference Guide 2004-present*"  
Registered Journalist, *PR Newswire* 2002-present, Member, Mensa 1982-1989  
Recognized as "Top National Health Care Marketing Expert" by *Physicians Marketing Magazine*, 1988  
Board of Directors, & Highest Achiever Award, Alliance for Dental Management, 1984-5  
**BOOKS**—Published Author and Contributor

Author – *Medical Practice Valuation; Appraisal Guidelines & Workbook* published and distributed by PSR Inc., 2006-current  
 Author – *Guide to Valuing and Selling a Medical Practice*, American Osteopathic Association 2011  
 Co-Author – *The Medical Practice Forms Book*, published in 1995 - 2016 by McGraw-Hill & PMIC, 3 Editions  
 Co-Author – *The Medical Practice Preemployment Tests Book* published in 1996-2016, 2 Editions, by McGraw-Hill & PMIC  
 Co-Author – *AAAAI Practice Management Resource Guide*, AAAAI, 1<sup>st</sup>, 2<sup>nd</sup> & 3<sup>rd</sup> Editions  
 Contributor & Medical Industry Expert – The (annual 2004-2017) *Business Reference Guide to Pricing a Business*, Business Brokerage Press  
 Contributor – *The Three Stages of a Physician's Career, Chapter 3: Landing Your First Job*, Greenbranch Publishing, 2017  
 Contributor – *Accountable Care Organizations: Value Metrics and Capital Formation*, by Robert Cimasi 2013  
 Contributor – *Cash Crunch to Cash Flow*, by Bryan Malatesta CPA, 2010  
 Contributor – *Succeeding from Medical School to Practice*, published 2008 by the American Medical Association  
 Contributor – *The Medical-Dental-Legal Update 2007*, published by American Educational Institute  
 Contributor – *New Family Physician Toolkit*, published by the CA Academy of Family Physicians 2005  
 Contributor – *The Physicians' Marketing Handbook*, Burgess Communications, 1986  
 Contributor – *The Dental Office Manager's Handbook*, Burgess Communications, 1986  
 Contributor – *Closing Your Practice* published in 1997 by the American Medical Association  
 Contributor – *Mastering The Reimbursement Process 2<sup>nd</sup> edition* in 1998 by the American Medical Association  
 Contributor – *Medical Office Handbook Second Edition*, published in 1996 by Miriam Webster  
 Contributor – *Strategic Use of Health Care Data* in 1997 by HCIA  
 Contributor – *Primary Care Strategy - Toward a Sustainable Partnership with Primary Care*, and  
*Stopping The Bleed - Reversing Losses on Owned Practices*, in 1999 by the HealthCare Advisory Board  
 Contributor – *Reengineering the Medical Practice* 1996 by St. Anthony's  
 Contributor – *Physician Practices: Key Value Drivers in a Changing Environment, Pricing a Practice* 2013 Business Brokerage Press  
 Contributor – *Financial Intelligence for Physician Practices*, 2017, The Coding Institute,

#### PERIODICALS AND JOURNALS—Published Author and Contributor

American Medical Association's *American Medical News*, "Practice Tune Up", "Making Your Move", "Straighten Up", "Treating Your Practice - The Business Side of Medicine", "Steer Your Cash to Keep it Flowing", "You're Ready for the Exam but Where's the Patient?", "Practice Size Trend: small to big, then small once again", "Deciding Who Decides – How Practices Get Governed", "Expenses: What It Costs", "True-Value in Buying and Selling a Practice", "5 Answers to Your Recession Questions"  
 American Academy of Family Physician's *Family Practice Management* "Practical Tips to Boost Your Efficiency and Cut Practice Costs in Managed Care", "Increasing Productivity with Labor", "What Distinguishes an Office Manager from an Administrator?", "Three Steps to an Effective Practice Budget", "Ask FPM – Appropriate Staffing", "Creating an Employee Manual", "Selling a Practice", "Starting a Practice in a Health Professional Shortage Area", "Negotiating Salary as a Percentage of Collections"  
 American Academy of Dermatology's *Dermatology World*, "Valuing a Dermatology Practice: 2 Part Series"  
 American College of Physicians/ASIM *Observer*, "Expert Offers Simple Marketing Strategies", "Getting Your Fair Share?-Tips on Ways To Divide a Group's Income", "With Retirement, It's Never Too Early To Start Planning", "Ten Tips to Make Marketing Work for your Practice", "Physician Employment Trends 2004"  
 American Academy of Ophthalmology's *AAOE Executive Update*, "10 Marketing Tips for Your Practice", "Practical Cost Control Tips", "Update on Ophthalmology Overhead"  
 California Academy of Family Physician's *California Family Physician* and *Practice Management News*, "Ethical Negotiating Techniques for a Better Practice", "10 Essentials for Today's Family Physician", "New FP Toolkit", "Key Concepts in Practice Improvement", "Managing and Reducing Overhead", "Insurance Contracting Update", "California Labor Law Compliance"  
 California Medical Association's *California Physician*, "21 Marketing Strategies for Physicians", "Routine Chart Auditing", "What Does Your Receptionist Tell Patients About Your Practice?"  
*Briefings on Practice Management*, "Capitation 101-A Primer on an Up and Coming Reimbursement System", "Medical Practices Become Innovators", "Choose the Right Marketing Approach", "Center Your Practice on Your Customers"  
*California MDs Business Advisor*, "On Managing Managed Care", "What is Your Practice Worth?", "30 Ways to Fill and Control Your Appointment Book", "Four Steps Out of the Medical Recession"  
*Children's Hospitals' Doctors' Digest*, Reducing Overhead by Expanding Your Schedule  
*Contemporary OB/GYN* "Starting Up or Starting Over? Here's How to Avoid Mistakes"  
*Business Brokerage Press*, "How To Broker a Medical Practice", May 2018  
*Dermatology Times*, "Preventing Toxic Employees from Poisoning Your Practice in 2013"  
*Dermatology World*, "Physicians are the Key to Valuing a Dermatology Practice", "Valuing a Dermatology Practice for Purchase", "Planning Ahead for Office Disasters can Save Your Practice", "Do the Math Before Adopting New Technology"  
*Doctor's Digest*, "Managing Your Practice's Money"  
*Doctor's Financial Report*, "How to Network for More Referrals"  
*Executive Report on Physician Organizations*, "Keep Your Finger on the Pulse of Your Organization"  
*EyeCare Management*, "Optometrists Best Source of Ophthalmology Referrals", "Keys to Doctor Cooperation"  
*Family Practice News*, "Managing Practice Costs Key to Staying Competitive"  
 Georgia Academy of Family Physicians Membership Welcome Packet Materials  
*Health News*, "8 Things To Do Now To Get Ready For Managed Care"  
*Internal Medicine News*, "Managing Your Practice to Save On Overhead"  
*Journal For the Am Assoc of Office Nurses* "A Handy Form to Evaluate Staffers"  
*Life in Medicine*, "Questions to Ask a New Partner Prospect."  
*Managed Care*, "Beat The Clock: How to Control Your Practice Pace", "Charting Your Strategic Course", "Written Tests Can Help You Hire The Best Employees"

#### (PERIODICALS AND JOURNALS—continued)

*Managed Care Forum (CAFP)*, Options in FP Group Formation  
*Marin Medical Society Bulletin*, "Getting the Most Mileage From Business Cards"  
*MedEsthetics Magazine*, "An Evidence Based Approach to Cosmetic Fee Setting"

*Medical Economics Magazine*, "Mistakes Doctors Make When Buying or Selling a Practice", "Making Handouts Work for You", "The Worst Mistakes Doctors Make With Their Retirement Plans", "Family Practice: How Long Can the Good Times Roll?", "Kiss Paperwork Hassles Goodbye", "Turn Unhappy Patients Into Loyal Ones", "WWW: Can Three Little Letters Spell Prosperity For Your Practice?", "Quick-Cut \$20,000 in Practice Costs", "Click on the New Technology" "Why That Computer Bargain May be Anything But", "Doctors and the Web: Save Thousands", "Are You Fighting Over New Patients?", "Who Will Buy Your Building, Doctor?", "Where the Jobs Are", "How To Find and Keep Topnotch Clinical Staff", "Medical Record Evaluation Form", "Outsource Billing? Here's How", "Keeping Tabs on Practice Finances", "Medical Record Evaluation Form", "Monitoring Business Performance", "Making Sure New Equipment Pays Off", "Getting Patients To Grade Your Office", "How Hard You Work", "Evaluating New Physicians", "Keeping Tabs on Insurance Plans, "Expense Survey: What to Spend, What To Cut", "Loans, Leases and Credentialing", "No Coding, No Insurers, No Kidding", "Want a Better Deal? – Ask!", "What's Eating Your Profits?", "Getting Patients To Pay", "Before You Interview Job Seekers...", "How To Give and Receive Employee Feedback", "You Too can be a Dotcom Doc", "Keep Your Billing On Target", "Starting A Practice" series, "Earnings: Primary Care Tries to Hang On", "Smooth The Way For New Patients", "10 More Ways to Work Smarter", "If a Patient Wants to Tape The Visit", "Calculate Your Lifestyle Quotient", "When There's No Money for Raises", "Own Your Office – What To Consider", "How To Value Your Practice", "Do Doctors Need Employment Practices Liability Insurance?", "Doing a Reference Check", "10 Ways to Foil an Embezzler", "How to Plug Revenue Leaks", "Does Your Front Desk Staff Draw Patients In – or Turn Them Off?", "Practice 911", "Patients Using Credit Cards", "Tips for Helping Your New Hire Succeed", "Use Marketing To Draw In More Patients", "How to Handle the Paperwork Glut", "No-nonsense Practice Sale Tips", "How To Land The Best Associates", "Say Goodbye To Insurers", "Better Medicine Through Benchmarking", "The Cure for Too Much Overtime", "The right Way to Buy or Sell a Practice", "How to Find an Attorney Who's Right For You", "Staffing: How Will EHR Affect Your Need for Personnel", "Active Patient Count Benchmarks", "Landing Media Quotes", "How Much Cash Do You Need?", "Calculating AR Value", "Lending To An Associate", "Improve the Financial Position of Your Practice with Science" "What's Your QR IQ?", "Marcus Welby MD is Dead", "Practice Owner or Hospital Employee?", "3 Steps to Controlling Staff Costs 2013", "Evaluate Economic Impact of NPPs", "How to Make Payment Plans Work", "7 Ways Physicians Can Take Control of Uncompensated Time in 2017", "Calculating ROI on Equipment Purchase", "The Growing Number of Uncompensated Tasks in 2017", and editorial consultant.

*Medical Economics Audio Digest*: How Doctors Can (and Do!) use Web Sites, How To Write a Classified Ad for Recruitment

*Medical Practices and Managed Care*, (AMA) "Is your Practice Administrator still up to par?"

*Medscape*, "Physicians Delaying Retirement Because of Recent Recession", "The Achilles Heel of Group Practices"

*MGMA Management Update*, "Finding Productivity Leaks In A Group"

*National Committee for Quality Assurance (NCQA)* "Huddle Up! Helpful Hints to Make the Most of Five Minutes"

*Neuropractice*, "Determining the Feasibility of Capitation Rates"

*Northern California Medicine*, "How to Attract More HMO Patients", "Software Solutions: Things Your System Will Not Do", "Attracting the Right Payor Mix", "The Coming Marketing Wars For Patients", "Specialist Marketing In Managed Care", "Marketing Elective Care", "Capitation vs. Discounted Fee-For-Service", "Map a Marketing Strategy".

*OBG Management*, "How to Get Paid On The Spot"

*OB Gyn News*, "Managing Practice Costs Improves Bottom Line"

*Capitation Management Report*, "Forms Can Help You Evaluate Feasibility of Capitation Rates"

*Ophthalmology Management*, "Survey Your Office From Your Patient's Point of View"

*The Patient Centered Endocrinology Practice* "Improving Patient Registration"

*Patient Pleasers*, "Look Before You Leap into Free Services for Indigents"

*Pediatric Management*, "How to Land More Physician Referrals"

*Pediatric News*, "Managing Your Practice to Lower Overhead"

*Physicians' Financial News*, "Efficient Patient Scheduling Can Cut Waiting Time, Improve Bottom Line", "Pros and Cons of Computerized Scheduling Systems", "Before Blaming Managed Care for Losing Patients, Check Your Own Practices",

"Marketing Strategies for Selling Your Practice"

*Physician's Management*, "Do Your Patients Know What You Do?"

*Physician's Marketing and Management*, "Discussing Costs in Advance," "Is It Time to Raise Your Prices?," "How Much Should You Spend On Marketing Your Practice?," "Patients Who Request Brand Name Drugs", "Positive Attitude Encourages Compliance From No-Shows", "Use X-Rays as a Marketing Tool", "A Sign on the Reception Desk Lets Patients Know...", "Choose a Management Consultant for Routine Practice Examinations", "Is it a Mistake to Promote from Within?," "When Partnerships Fail—Determine Division Terms at the Beginning of Partnerships to Avoid 'Messy' Terminations", "How to Make Your Time with Patients Count", "Ten Telephone Time Savers", "Physicians Can Be The Root of Overtime Ills", "How Much Should You Budget for Marketing Your Practice?," "Making The Decision to Reject a Contract", "Trend Surfing for Profitable Cash-Based Services", "Outcomes Data Becoming #1 Marketing Tool in Managed Care", "Employees prove Fertile Ground for Marketing", "Crystal Ball: Physicians Spend More on Marketing", "Design Web Sites With an Eye on Costs", "Persuade Physicians to Invest in Marketing", "Sample Collection Letter", "Pre-employment Testing Can Improve Staff Quality", "How to Choose a Practice Management Consultant". "Taking Action on Patient Satisfaction Survey Results", "5 Methods for Improving Survey Responses", "Hit Late Doctors Where it Hurts - In The Wallet", "Letting your fingers do the walking pays off in the Yellow Pages", "Academic Practices Could Benefit From Marketing", "Newsletters Can Sell Your Practice", "Waking Up From the Nightmare of Reference Checks", "Improve Communication with Staff"

*Physicians' Practice* "Smart Ways to Save", "How To Launch A Practice", "Surviving the Economic Downturn", "Are You Burning Money?," "6 Ways to Get Organized", "Dealing with Physician Departures", "8 Ways Practices Can Prevent Physician Burnout"

*Practice Personnel Bulletin*, "Don't Let Your Practice's Personnel Bulletin Back You into A Corner", "Private Practices Face Steep Competition for Qualified Employees", "Employee Compensation: Is it a Mystery That Can Be Solved?"

*Primary Care Success*, "Just Say No to PHOs", "Waiting Room Comfort"

*Renal & Urology News*, "What to Know Before Buying a Practice", "5 Ways to Make Your Practice More Efficient"

*Review of Ophthalmology* "Cast Your Net", "Getting Started with a Marketing Plan"

(PERIODICALS AND JOURNALS—continued)

*San Francisco Medicine*, SF Medical Society, "How the Baby Bust Affects Your Practice"

*San Mateo County Medical Society Bulletin*, "Ten Telephone Time Savers"

*Solutions*, "Health Literature Helps You Sell Yourself", "Marketing in the Waiting Room" and "Getting the Most From Business Cards"

*Skin and Allergy News*, "Managing Practice Costs to Boost Profitability"

*Sonoma County Physician*, "Do Your Patients Know What You Do?" and "Ten Telephone Time Savers"

*Technology in Practice*, "Changing Practice Management Software"

*The Business Broker*, "Must Consultants be Licensed?"  
*The Health Care Practitioner* "Options in Medical Practice Group Formation"  
*Unique Opportunities Physician's Resource*, "Spreading the Word - Marketing to Keep Your Practice Soaring"  
*Urology Times*, "Keep Employee Feedback Consistent, Constructive", "Six Ways to Evaluate a Physician Employment Offer", others  
*Vital Signs*, "What Does Your Receptionist Tell Patients About Your Practice?"  
*Urgent Care Business Report*, "Keep Patients' Confidence"  
*Urgent Care Magazine* "Riding the M&A Wave: How to Know & When to Sell Your Urgent Care Practice"  
*Urgent Care Medicine Journal*: "Valuation of an Urgent Care Clinic"

#### TEACHING/SEMINARS FACULTY:

Development and delivery of management and marketing seminars for State, County and National Medical Societies, IPAs hospitals, and health care professional groups: "How to Find, Hire and Keep Quality Employees", "Finding, Hiring and Keeping Great Staff in San Francisco's Competitive Market", "How to Establish a Private Practice", "Managing an Established Private Practice", "Effective Personnel Management", "Fee Setting", "Communicating Quality", "Financial Survival in the '90s for the Primary Care HIV Practice", "Increasing the 'Ideal Patients' You Care For", "Practice Vital Signs—What They Are and How to Monitor Them", "Strategic Keys to Profitable Practice Management in the '90s", "Ten Steps to Build Practice Profitability in the '90s", "Practical Techniques for Managing Managed Care and Discount Contracts for Profitability", "Strategies For Success in Managed Care", "Practical Alternatives to Single Specialty IPAs", "Trends In Group Formation and Purchasing of Practices", "Importance and Value of Capitation", "What Capitation Means to You and Your Office Staff", PCP Marketing for the Right New Patients, On a Budget, in a Managed Care Environment", "Specialist Strategic Planning Options and Marketing Techniques in a Managed Care Environment", "Managing Medical Office Costs in a Managed Care Environment", "Cost-Effective Management of the Managed Care Patient", "Practical Application of Managed Care Principles in Family Practice", "Advanced Cost Controls and Marketing Strategies in Managed Primary Care", "How To Adapt Your Practice To Managed Care", "Improving Practice Efficiency With Electronic Networking", "Compensation and Budgeting for the Primary Care Practice", NYAFP-"Options for Family Physicians in the Consolidating Health Care Market", AAFP-"Managed Care and You-The Basics", AAFP-"Managing Medical Practice Costs in a Managed Care Environment", AAFP- "Options in Family Practice Group Formation", AzAFP-"Time Management & Office Efficiency", AAOFAS-"Specialist Networks and Centers of Excellence Strategies", IAFP/MAFP/WAFP-"Building Primary Care Rural Health Networks", "How To Cost Effectively Find, Hire and Keep Great Staff", "60 Marketing Techniques in 60 Minutes", "AAFP-Cost Controls in Managed Care", "CAFP-Practical Tools for Employment Evaluation for Residents", Westwood Squibb-American Academy of Dermatology "Principles of Practice Management", NAHC "Pre-employment Testing: A Valuable Service for Doctors", AAFP/CAFP Residents "Practice Opportunity Evaluation and Management Tools" and "Effective Negotiation", ACP/ASIM/ASTRA "Effectively Handling Complaints in Your Office", "Managing Your Managed Care Environment", "Effective Strategies for Marketing Your Practice", GLAXO/PFIZER/SRGMC "Increasing Profits Through Controlling Costs In Your Private Practice", AAFP 2000-2007 How to Find, Hire and Keep Great Staff" and "Managing Practice Costs to Improve Practice Viability", Sonoma State University Small Business & Entrepreneurship program "Starting an eCommerce Company", AAD 2001-2010 residents program "Medical Practice Management for Residents", "Practice Options in Dermatology, CAFP 2001 Scientific Assembly "Negotiating a Contract" and "Picking a Practice". Instructor to consultants in management and marketing, Alliance for Dental Management, 1984-85, 2002 CAFP Scientific Assembly Financial Issues Facing New Family Physicians, AAFP 2002 Time Management for Physicians, NAHC Practice Marketing 2004, Medical Economics Roundtable 2004, AAAAI 2004-8 Overview of Practice Management, and "Time Management" and "Best Practices", CAFP California Conference for Family Medicine Residents "Debt Management Workshop" 2005, AAAAI 2005 "Valuation of Allergy Practices" and "Financial Health of Your Practice" and "Starting an Allergy Practice", AAD 2006-10 management seminars "How to Become a Better Negotiator", "Employee Incentives", "Practice Options", "Practice Management & Marketing", "Recruiting for and Valuing Your Practice", "The Economics of Dermatology Practice", "Staff Issues & Employment Manuals", AAAAI 2006-11 "Options in Practice", & "Marketing the Established Allergist", "Advanced Financial Practice Management", AAD 2006-10 Practice Management Regional Courses "Practice Management, Employee Handbooks, etc", Connetics Connections 2006-7 "Dermatology Practice Management", NSCHBC 2008 Valuation Topics – Panel Discussion, Medical Economics Magazine/NSCHBC 2010 – "Impact of the Obama Plan on Valuation of Medical Practices", National Trust Closely Held Business Association (for bankers) NTCHBA sponsored by Wells Fargo Bank "Valuation and Sale of Healthcare Practices" 2011, NSCHBC 2012 Faculty "Valuations and Hospital Integration" along with Reed Tinsley CPA and Jay Sanders CPA, and "Threats and Opportunities in Primary Care" roundtable discussion sponsored by Medical Economics Magazine; 2013-14-15 AAAAI Medical Website and Social Media Strategies, Expanding the Scope of Your Practice,

#### OTHER:

Co-founder, Director & COO, Advocates for Primary Care, a PPMC with 1,200 doctors, 1994-1998  
Founder, Director and interim President & CEO of one of the early medical supply dotcoms, MedicalSuppliesUSA.com 1998-2000  
Consultant to MedPlexus Inc. a medical software company endorsed by AAFP, later acquired by GE Healthcare 2003-2004  
Editor DMOZ-ODP; (Editor of content for Google, AOL, etc) categories: Medical Marketing, Business Appraisal; 2000-2009  
Graduate: Google University; AdWords training program 2002  
*Medical Economics Audio Digest* expert interviewee, "Physician Web Pages"  
*Eyeville* ophthalmology contributing consultant 1990s  
Medical Arts Press. Reviewer of new publications, 1990-1994  
Consultant to Krames Communications; the world's largest publisher of patient education information; 1980s  
Assisted in the growth and success of almost 1,000 health care practices and companies in the United States, including the formation of over 40 medical groups and IPAs of up to 1,200 members each, and management & training to healthcare business consulting groups and MSOs.

## SPONSORS AND REFERRORS

### ORGANIZATIONS THAT HAVE SPONSORED SEMINARS OR REFERRED ME TO THEIR DOCTORS INCLUDE:

American Medical Association	American Osteopathic Association
American Academy of Family Physicians	The IPA Association of America
American College of Physicians/ASIM	Healthcare Executives of Northern California
American Academy of Ophthalmology	Hoechst Marion Roussel
American Academy of Neurosurgeons	Hospital Council of No. and Central California
American Academy of Dermatology	No. CA Healthcare Marketing Association
American Academy of Allergy, Asthma and Immunology	Bay Area Health Care Planning Association
California Academy of Family Physicians	No. CA Medical Group Management Assoc.
Arizona Academy of Family Physicians	Valley Medical Group Management Association
New York Academy of Family Physicians	Women Health Care Executives
Illinois Academy of Family Physicians	Society of Medical Dental Mgmt. Consultants
Wisconsin Academy of Family Physicians	Illinois Academy of Physician Assistants
Missouri Academy of Family Physicians	National Assoc. of Health Care Consultants
Medical Group Management Association	Astra Pharmaceuticals
San Francisco Medical Society	SCMA Young Physicians
Marin Medical Society	Sonoma State University
Napa Medical Society	National Medical Enterprises
San Mateo Medical Society	Stiefel Connetics Laboratories

### HOSPITALS THAT HAVE SPONSORED SEMINARS OR REFERRED ME TO THEIR DOCTORS INCLUDE:

Sutter Health Systems	Santa Rosa Memorial Hospital	Camden-Clark Memorial Hospital
Mercy Hospitals	Hoag Hospital	Saint Rose Hospital
Catholic Healthcare West	Black Hills Hospital	Novato Community Hospital
Tenet Health	Providence Hospital	San Ramon Regional Hospital
Adventist Health Hospitals	Doctors' Hospital	Tahoe Forest Hospital
Santa Rosa Community Hospital	Northbay Medical Center	Mt. Zion Medical Center of UCSF
Los Gatos Hospital	St. Mary's Hospital	Saint Francis Memorial Hospital
Healdsburg General Hospital	John Muir Hospital	Children's Hospital
Palm Drive Hospital	Seton Medical Center	Pacific Presbyterian Hospital
Queen of the Valley Hospital	Sonoma Hospital	Northeast Nevada Regional Hospital

### ACADEMIC EDUCATION

Bachelor of Arts Degree in Communications (Advertising and Media Production), Ithaca College, New York, 1973

University of Phoenix: Advanced university coursework resulting in a CA Real Estate Broker License 1982

Florida Real Estate School: Advanced coursework resulting in a Florida state Broker license, 2009 & renewals

Certification (CHBC): NSCHBC Certification Course & Test 2008

California Association of Business Brokers: Coursework & Test resulting in Certification

### Appraisal & Practice Brokerage Related Continuing Education:

Medical Practice Appraisals – Valuation; *National Assoc of Health Care Consultants; Tom Helling IBA-MCBA; 1990*

Valuing Medical Practices – Theory and Practice, *Society of Medical Dental Business Consultants; Geoffrey Anders of The Goodwill Registry 1992*

Appraising Practices in the Real World; *Institute of Business Appraisers; 1993*

Mastering Appraisal Skills for Valuing the Closely-Held Business; *Institute of Business Appraisers #8001; 2001*

Business Appraisal for Divorce; *Institute of Business Appraisers; 2001, 2005*

Arbitration/Mediation; *California Association of Business Brokers; 2003*

Legal Aspects of Business Brokerage; *California Association of Business Brokers; 2003*

Developing Expert Witness Skills & Expert Witness Testimony Workshop, *Institute of Business Appraisers #7001; 2003*

Case Studies in Small & Mid-Size Business Appraisal, *Institute of Business Appraisers #1013; 2003*

Benchmarking Using Association Statistics; *National Assoc of Healthcare Consultants; Robert Cimasi ASA, CBA, AVA; 2005*

Valuation of the Medical Practice; *National Society of Certified Healthcare Business Consultants; Carol Carden; 2006*

Performing a Practice Valuation; by author Reed Tinsley, *National Society of Certified Healthcare Business Consultants , 2007*

Mergers, Acquisitions & Dissolutions; by author Reed Tinsley, *National Society of Certified Healthcare Business Consultants , 2007*

The Value of Practice Statistics by Rick Willeford CPA, *National Society of Certified Healthcare Business Consultants , 2007*

Escrow Management, Sales Comparison & Cost Depreciation & Income Approaches to Valuation, Comparative Market Analysis, Basic, Business Appraisal, Brokerage Relationships, Contracts, Financing Real Estate, , Federal Income Laws Affecting Real Estate, Investment Real Estate, Zoning & Planning, Property Management; *Florida Real Estate Commission, 2007*

Valuing The Very Small Company; Trugman, Seigneur & Colins; *BVResources, 2008*

Florida Real Estate Brokerage, Essentials of Real Estate Investment, *Florida Real Estate Commission, 2008*

Key Business Valuation Concepts, Update on Issues on BV Standards and Case Law, *NSCHBC; Robert Cimasi, Helling & Tinsley, 2008*

Attack on Niche Providers, Physician Transactions/Joint Ventures, HHS/CMS Policy Update, Statistical Models for Consultants, *NSCHBC 2008*

Dental Practice Transitions, 2008 *NSCHBC*

Veterinary Practice Valuation, 2009, *BVResources*

Valuing Physicians Practices 2010 , *BVResources, by David Dietrich CPA/ABV*

Analyzing & Recasting Financial Statements, *CABB/ International Business Brokers Assoc. University, 2010*

Real Estate Law Update, Escrow Accounts, Real Estate Finance Laws and Trends, Broker Renewal, *Florida Real Estate Commission, 2011*

Physician Contracting With Hospitals, What to Make of Medical Statistics, Valuations and Hospital Integration, Emerging Opportunities, *NSCHBC 2012*

### Other Continuing Education Programs Attended :

McVey Medical Collections; Managing for Results; Specialist Marketing; Allergists and Public Relations; Marketing Communications for the Allergist; Successful Opticians; How to Market your Head and Neck Surgery Practice; Professional Optical Sales; The Physician Confronts the Marketer; Medical Practice Management; Publicity: How to Get It; Guerrilla Marketing; Getting Started in Private Practice; Conomikes Marketing Techniques for a Successful Practice; Successful Public Relations for Professionals; Business Administration for Dental Assistants; MS Dynamics of Supervision; Apron King Dentistry for Fun and Profit; Marketing Office Based Surgery; Effective Collection Procedures; Clinic Collections Seminar; Tact and Skill in Dealing with People; Opening Closed Minds; The Art of Creative Listening; Credit Cleaning; Handling Objections; ENT/Plastic Surgery Marketing; Marketing Orthodontics; Long Range Planning for the Dental Office; Dentistry in Your Local Community; The Winning Combination; The Practice Builder; Reaching for the Top - The Importance of Challenge; How to Run an Effective Business Meeting; Staff Recruiting, Management, and Development; How to Implement a Positive Accounts Receivable Policy in Your Clients Practice; Review of the Proposed Stark Bill and its Affect on Joint Venturing; Individual & Corporate Taxes Flexible; Benefit Plans for the Small Business; Updates on Pension and Profit Sharing Plans; How to Uncover Coding and Reimbursement Problems for Clients; Medical Group Formation; Challenges of Adding an Associate to a Solo Practice; Medical Office Accounting--Level I, Forming a Managed Care Network in a Regional Health System, Dr. Charming--Matching Quality Care with Bedside Manner; Preventing Health Care Waste: Using the Right Mix of Preventive Services, Standing at the Gate: Ethical Conflicts for Family Physicians in a New Era of Health Care, Negotiating and Evaluating a Managed Care Contract, Bridging the Gap: Office Management in Managed Care, Medi-Cal Managed Care: How to Be a Player, Managed Care and Family Practice: Transforming Theory Into Reality, Quality Improvement Means Business, Honing Your Negotiating Skills: Successful Strategies for Managed Care FPs, Strategic Business Decisions, Dealing with Problem Patients in a Managed Care Setting, Negotiating for Family Medicine Privileges in a Closed Panel HMO, Family Physicians as Executives: How to Become a Leader in a Managed Care System, AMA perspective on Health System Reform, Americans With Disabilities Act Update, Fraud and Abuse in Mergers and Integrated Health Networks, How the New Safe Harbors Affect Doctors, Management Skills for the Managed Care/Competition Era, Staying On Top-The next Generation of Integration, The Consultants Role in Integration, Anti-Trust Issues Concerning Group Formation, Physician Compensation Arrangements, Forming Rural Health Clinics, Negotiating Managed Care Contracts, Taxes and Employee Benefits Including Their Effect On MSOs PHOs and POS, MSOs/PHOs: Challenge For Information Technology, Integrated Health Care: Key Strategies & Implications, The Basics of Managed Care Models, California Managed Care Models, Building an Effective Primary Care Base; Future Economic Integration of Hospitals and Physicians; Legal Issues Facing Integrated Systems; Physician Leadership: The Constraint to Rapid Integration; Before You Manage Care You'd Better Manage Expectations; Advanced Negotiating Skills; Successful Strategies For Managed Care FPs; Team Building in Managed Care Systems; Legal Issues in Managed Care; Family Physicians: Succeeding in Managed Care; Physician Compensation in Managed Care Systems; Advanced Payment and Incentive Structures; Payor Perspective: Succeeding in Managed Care; Total Quality Management: Continuous Quality Management; Case Management and Patient Education in Managed Care Systems; TQM: Management Tool For Managed Care; Practice Parameters and Patient Outcomes; Behavioral Health Programs in Managed Care Systems; Truth-Ethics-And Managed Care; The Next Generation of Managed Care; CAFP Scientific Assembly 1995 Managed Care Update; MGMA's Integration From The Small Group Practice Perspective; Building Self-Directed Work Teams; Consulting For Dental Practices, Income Division in a New Environment, IPA Development and Administration, Limited Liability Companies: Material Federal Tax Issues; Negotiating Managed Care, Purchasing of Physicians Practices; Corporate Practice of Medicine; Capitation-Global; Systems Preparation for Capitation; Outcomes Measurement and Management; Marketing On The Internet; Medical Groups Statewide - A Roundtable Discussion; Mega Systems' Impact on PCPs; Health Plans' Views of The Direction of Managed Care; Health Plans' Views of What To Expect in the 90s; Improving Practice Efficiency With Electronic Networking; ABCs of Managed Care; Advanced Compensation and Financial Incentives; Dealing With Problem Patients in Managed Care Settings; Medical Groups in the 90s; Partnership Strategies for HMOs and Primary Care Physicians; Primary Care in the Year 2000; The California Healthcare Market: Coaching and Teambuilding Skills For Managers and Supervisors, Strategies for Specialty Network Survival; Consolidating and Managing the Physician Practice Management Industry; Why Practice Management Companies are Primed To Succeed; Where We're Headed, The Physician Practice Management Companies Speak; The Physician Perspective on PPMs, Successfully Investing in PPMs, The Investor's Perspective; Understanding the History, Types and Structures of PPMs; Determining True Value: How Much is a Physician Practice Management Firm Worth?; Achieving and Managing Dramatic Growth of a PPM; Buyers Beware: Eliminating Traps, Pitfalls and Risks in Physician Practice Acquisition; The Race For Control: measuring Competition for Physicians and Market Position; Managing the Beast: Successful PPM Management Strategies; How Capitated Group Practice Changes Medical-Legal Risk; The Future of the Healthcare Marketplace; Build Your Own MSO; OSHA and CLIA Update; Managing Change; Personnel Issues and You; Quality Measures; MSO Models; MSO Reimbursement; Management Tools for MSOs, Easing the Pain of Medical Integration; NCMGMA-Single Specialty PPMC Issues and Opportunities, E&M Documentation Update, Brush up on RFPs, Helping Clients Manage the Future, The Challenge of Healthcare Compliance, Strategies for Developing and Implementing Compliance Plans, Card-Based Technology and Healthcare, Compliance Needs of Smaller Practices, Software Piracy, Insurance and Risk Management. PSOs--A Double Edged Sword, Capitation--The California Experience, A Mergers & Acquisitions Approach to Growth, Healthcare Consulting in Transition, PPMCs--Practical Evaluation, 1998 Labor Law Update, Meeting the Information Needs of IPAs, Connecting Physicians Using Internet Technologies, Why IPAs Fail; Avoiding the Mistakes, Future Models for Physicians, Managed Care; The Next Generation, PPMCs; The Past Present and Future, Open Access; Back to the Future?, Market Comparison: Who's Ahead of the Curve, The Future of the Managed Care Marketplace, Physician Organizations of the Future, Technological Innovations in Physician Group Management, Evolution of Health Care in America, how Public Policy Impacts and Influences Physician Organizations, Coping with Cyberspace: The Internet's Challenges, HIPPA Compliance, Institute of Business Appraisers' Mastering Appraisal Skills for the Closely Held Business I & II, Valuation of Healthcare Entities in a Changing Regulatory and Reimbursement Environment, Business Appraisal for Divorce, Managing Managed Care in Dermatology, Building Successful Patient Relationships, Coding and Reimbursement Tips in Dermatology, Developing a Cosmetic Dermatology Practice, Medical Employment Contracts, Office Automation and Billing Systems, AAFP Practice 2010, Conducting Practice Administrative Functions Online to Improve Your Bottom Line, The Role of Margin in Professional Well-being, Setting Up Profitable Ancillary Services, Your Client's Fee Schedules, How to Use NAHC Statistics, Electronic Medical Records Update, The Latest in Staff Compensation and Benefits, Practice Governance, OIG Perspective on Issues, Non-Physician Providers 101, New Practice Start-Up, Using the RBRVS Fee Calculator, Health Savings Accounts, A/I Patient Flow, Compensation and Benefit Distribution for Solo/Partner Practices, A/I Office of the Future, Benchmarking Using Association Statistics, Valuation of the Medical Practice, Mergers Acquisitions & Dissolutions, Practice Startup and Credentialing, Fee Schedule Analysis, Financial Benchmarking, Healthcare Compliance Update, 2007 Healthcare Law Update, Setting Office Standards for Service Excellence, Physician Extenders in Dermatology, Melding Dermatologic Pathology into Your Practice, Cosmeceuticals Marketing, Techno Gadgets to Keep Your Practice on the Cutting Edge, Using the Internet to Market Your Practice, EMR: Where Are We Now?, Medical Office Design to Maximize Patient Safety, Negotiating with Insurance Carriers, Computers in Dermatology, Operations Management; Optimizing Patient Flow to Enhance Patient Satisfaction, Building Bridges - Collaborating with Physicians in Your Community, Optimum Office Efficiency, Coding News in 2010, Practice Pitfalls, Coding with the Pros, 2010 Dental Valuation and Transitions, Dental Statistical Benchmarks, IBBA - Analyzing and Recasting Financial Statements 2010, BVR/NACVA Healthcare Symposium on Healthcare Reform 2011 - Dietrich, Cardon & Barbo, NSCHBC 2012: Physician Contracting With Hospitals, What to Make of Medical Statistics, Valuations and Hospital Integration, Emerging Opportunities in Healthcare, ICD-10/Meaningful Use/ RAC Updates, HIT Industry Trends, 2013 Coding 101, Expanding the Scope of Your Practice, Starting in Allergy Practice, Using Social Media in Allergy Practice, New Trends in ACOs, Advanced Financial Management, Compensation Current Trends and FMV 2015, Our Fragmented Physician Workforce, Health System Clinical Integration Objectives, Critical Compliance Issues for Medical Practices, Business MegaTrends Impacting HR, Concierge Medicine - The Leader in Continuity of Care, Helping Physician Practices Negotiate and Deal with Managed Care Plans in 2018

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