

Let us help you grow your dental practice

As your dental practice grows, it's important that you are able to provide the best care and service to your patients. That's why you became a dentist in the first place, right? You shouldn't be caught up worrying about tax and accounting matters. When you partner with Aprio, you will be free to focus on your patients and growing your practice.

Every day our Professional Services group works with dental practices across the Southeast to enable the effective use of strategies that reduce and manage tax liabilities, ensuring compliance while minimizing tax burden. Our professionals understand the challenges you face and will provide you with the advice and services you need at every stage in your practice's lifecycle.

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We offer comprehensive services that include:

- **Financial Statement Preparation** - Reassure yourself, your creditors and those looking to invest in your business that your finances are in order by having your financial statements prepared by Aprio. Our compilation services will provide you with monthly, quarterly or annual financial statements to ensure that your financial data is presented in conventional financial statement form.
- **Retirement/ERISA-401(k) Planning** - Insure that your plan complies with the law, maximizes your deductions and is appropriate for your practice, now and as it grows. Our retirement plan consultants are adept at analyzing company demographics to develop the optimal plan for your practice and your employees, while minimizing your taxes and optimizing your retirement fund.
- **Aprio Cloud** - enables small practices to reap the benefits of having a dedicated team of financial and accounting professionals delivering service on an enterprise platform - all for the cost of a full-time bookkeeper. Your Aprio Cloud professionals will provide multiple layers of exceptional service tailored to your practice needs. Our optional CFO service adds strategic insight into your business, competition and opportunities.



- **Private Client Services** – Aprio's Private Client Services synchronize every aspect of your financial life and provide a big-picture view of your complete financial landscape. Your Aprio advisor will coordinate financial, tax, estate and investment planning to reduce unnecessary tax liabilities, mitigate risks and maximize your returns. Get the best possible advice to advance your financial goals and prepare for what's next.
- **Compensation Planning** – A compensation program that attracts top talent and retains the talent you already have is vital to your practice's success. Aprio can assist you with developing a sophisticated compensation program that meets the unique needs of your practice.
- **Information Assurance Services** – Safeguard your practice from cyber risks. Our Information Assurance Services identify and address information risks through mitigation, transference or avoidance. Our services include: security and resiliency management, PCI compliance, HIPAA compliance, SSAE16/SOC2 reporting and data management and governance.
- **Tax Planning and Preparation** – We work with professional services firms to create strategies that reduce and manage tax liabilities while ensuring compliance. We will spend time with you each year reviewing your goals, discussing tax saving opportunities for your business and looking at the big picture to make sure your tax strategy aligns with your goals.
- **Transaction Advisory Services** – Looking to acquire another professional services firm? We go beyond routine due diligence to provide an independent perspective on your transaction that identifies deal breaker issues and opportunities for higher ROI. Looking to sell? We can help you set the right prices and terms for your deal. Our team will appraise your business's value, giving you the information edge to assess potential transactions.

About Aprio

Since 1952, clients throughout the U.S. and across more than 40 countries have trusted Aprio for guidance on how to achieve what's next. As a premier, CPA-led professional services firm, Aprio delivers advisory, assurance, tax and private client services to build value, drive growth, manage risk and protect wealth. With proven expertise and genuine care, Aprio serves individuals and businesses, from promising startups to market leaders alike.

Aprio.com



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