Tax and Business Planning
Provided by John K. McGill & Company, Inc.

Comprehensive Gameplan for Challenging Times

Uncertain about the future of your finances? Are you behind in saving for retirement? If so, we can help—with a **road map to navigate these turbulent times and achieve financial independence** through a well-designed, personalized plan. Our guidance, expertise, and support amid today's chaos delivers peace of mind, allowing you to focus on your patients and family.

To reach financial security, you must plan for it. Over the last 35 years, our team has helped over 1,800 dentists and specialists manage their personal and practice finances to reach, or exceed, their goals.

We're committed to your success with an **unconditional money-back guarantee at no risk to you.** If we can't save you more than the program's cost—we'll refund your entire fee—no questions asked.

"If you want to work with dedicated, proven professionals who will develop a personalized plan to get you to your goals, McGill & Hill Group will do just that."

– Dr. Dawn Wallace

We're Here to Help You:

- *Immediately* with COVID-19 planning (maximize PPP loan forgiveness and related tax benefits)
- Maximize personal and practice tax savings
- Amplify tax-deductible retirement savings
- Provide a comprehensive review of 2020 tax returns for further savings to maximize tax benefits of COVID-19 relief programs
- Improve practice profitability (fee structuring, marketing strategies, and overhead control)
- Implement proper insurance coverage
- Institute a plan to reduce/eliminate personal and practice debt
- Establish estate/asset protection strategies
- Fund children's educational expenses on a tax-deductible basis

What You Receive

Your tax and business planning program includes a new client kick-off call, a two-hour Revenue Enhancement call (if applicable), a half-day personal consultation, a comprehensive plan of action report, and ongoing quarterly meetings thereafter (12-month minimum commitment).

Initial One-Hour Conference Call

After receipt of your information, we'll schedule your kick-off call (doctor and spouse) to set goals, clarify data, and address any preliminary financial questions or urgent concerns.

Two-Hour Revenue Enhancement Call

(This step does not apply to orthodontists.)
Dr. Charles Blair will speak with you/your staff to review your fees, procedure mix, treatment protocols, insurance coding, and managed care strategies, to help you capitalize your revenue and reach your practice profitability goals.

In-Office (Charlotte, NC) Consultation

During your half-day meeting, you'll receive recommendations regarding tax-saving strategies, insurance coverages, retirement planning, educational funding, asset protection, practice profitability, debt reduction/savings, and estate planning. Representatives from McGill Advisors, a division of Brightworth and from FuturePlan by Ascensus will also provide suggestions for investment, wealth management, and retirement plans, when appropriate.

By the end of your in-office meeting, a plan of action will be agreed upon by both doctor and spouse to ensure your comprehensive financial plan is approved by all parties.

Comprehensive Tax and Business Planning Report

Following your meeting, we'll prepare and send you a detailed report outlining an implementation checklist of the recommended strategies that were discussed and agreed upon, along with financial projections, providing you with a solid plan of action.

Ongoing Coaching

Your advisor will provide ongoing coaching to help you successfully navigate your personal and practice finances. We'll partner with you to monitor your progress, assist you in implementing our recommended strategies, provide support, act as a sounding board, and answer any new or follow-up questions or concerns you or your spouse may have.

New Doctor Program

Tax and business planning is provided at a reduced rate for new doctors (practice owner for 3 years or less) by Mr. Lyon or Mr. Kucharo. For more information, contact Janet at **877.306.9780** or **janet.blair@mcgillhillgroup.com**.

Additionally, you'll receive a one-year complimentary membership (new or renewal) to The McGill Advisory.

Getting started sooner rather than later will give you the maximum advantage from our partnership together.

Quarterly Calls

To ensure your financial plan remains on track, you'll receive quarterly coaching conferences to review and accelerate your progress. Each quarter, we'll review a different aspect of your financial plan taking into account revisions in tax laws, adjustments in personal and family goals, changes in your practice, as well as current economic conditions to provide you with recommended strategies to keep you on track.

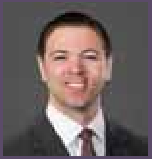
Let's Get Started

Partner with us today for a sound financial game plan that will deliver peace of mind and financial security for the future

Flexible monthly payment options available.

Contact Janet Blair today at **877.306.9780** or **janet.blair@mcgillhillgroup.com** to request the forms and checklist to begin.

Your Advisors



Bradley A. Kucharo, CPA, CFP®

Brad graduated from the University of Iowa and holds both a Bachelor of Business Administration degree and Master of Accountancy degree. Brad obtained his Certified Public Accountant certificate in 2007 and his Certified Financial Planner™ certificate in 2008. He formerly worked at PricewaterhouseCoopers, LLP in the Personal Financial Services Group performing tax and financial planning services for high net-worth individuals. He is a member of the American Institute of Certified Public Accountants and the North Carolina Association of Certified Public Accountants.

Wesley W. Lyon, II, CPA, CFP®

Wes is a graduate of Virginia Tech and holds degrees in both accounting and finance. He has obtained his Certified Public Accountant Certificate as well as his Certified Financial Planner™ certificate. Prior to joining McGill & Hill Group as a tax and business planning advisor with John K. McGill & Company, Inc., Mr. Lyon worked for a global asset management firm in Charlotte. Before relocating to Charlotte, he served as a financial planner and business advisor to high net-worth individuals in the Washington, D.C. metro area. Mr. Lyon began his career in public accounting specializing in tax and audit for non-profits.

Advisor Emeritus

John K. McGill, CPA, MBA, JD

John is a nationally prominent tax attorney and CPA who has specialized in dealing exclusively with the dental profession for more than 30 years. He is President of John K. McGill & Company, Inc., Editor of *The McGill Advisory* newsletter and shareholder in the law firm of McGill and Hassan, P.A. He graduated with honors from Erskine College and holds both a Master of Business Administration and law degree from the University of North Carolina at Chapel Hill. He formerly worked with the Office of Chief Counsel, the legal branch of the Internal Revenue Service, in Washington, DC.