



TAX AND BUSINESS PLANNING

Provided by McGill and Lyon Dental Advisors

COMPREHENSIVE GAMEPLAN FOR FINANCIAL INDEPENDENCE

Uncertain about your financial future? Behind in saving for retirement? Paying too much in taxes? If so, we can help—with a road map to **navigate today's ever-changing economic landscape** through a well-designed, customized plan.

Our guidance, proven expertise, and support 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.



"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:

- Increase practice profitability and EBITDA (fee structuring, marketing strategies, and overhead control)
- Maximize personal and practice tax savings
- Amplify tax-deductible retirement savings
- Determine if selling to a DSO is in your best interest and how it impacts your net worth
- Implement proper insurance coverages
- 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
- Evaluate real estate holdings
- Make sound financial decisions to reach your long-term goals

WHAT YOU RECEIVE

Your tax and business planning program includes a new client kick-off call (both spouses), a half-day personal consultation at our office in Charlotte, NC, a comprehensive plan of action report, and ongoing support as needed 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.

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, real estate matters, debt reduction/savings, and estate planning.

GUARANTEE

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.

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.

FOLLOW UP AND SUPPORT

Our team will support you to help you successfully navigate your personal and practice finances. We'll follow up to connect on your progress, assist you in implementing our recommended strategies, provide direction, 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 by Mario Santiago, CPA at a reduced rate for new doctors (practice owner for 3 years or less). For more information, contact Janet today at **877.306.9780** or **consulting@mcgillhillgroup.com**.

We have unparalleled expertise and experience working with dentists and specialists and will create a personalized plan for you, allowing you to rest easy today, while ensuring your financial security for tomorrow.

MCGILL ADVISORY NEWSLETTER MEMBERSHIP

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 relationship together.

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 **consulting@mcgillhillgroup.com** to request the forms and checklist to begin.

YOUR ADVISORS



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. He is President and CEO of McGill and Lyon Dental Advisors, a member of McGill & Hill Group. Prior to joining the group, Mr. Lyon worked for a global asset management firm. 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.



Mario G. Santiago, CPA

Mario previously worked as a public accountant for Deloitte & Touche in New York City serving a large financial institution. He is a graduate of the Kenan-Flagler Business School at the University of N.C. at Chapel Hill and holds a degree in Business Administration and Public Policy, as well as a Master of Accounting degree. He has also earned his Certified Public Accountant Certificate. As the son of two dentists, Mario has been familiar with The McGill & Hill Group since a young age. Prior to joining McGill and Lyon Dental Advisors as a tax and business planning advisor, he interned with the group over several years.

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.

