

YOUR PARTNER IN HEALTHCARE



Whitley Penn's Healthcare Advisory team partners with physicians and specialty practices to professionalize, strengthen, and grow their businesses at every stage, from launching a new practice to planning for retirement, and everything in between. You can work with us at any individual stage, or rely on us for experienced support throughout your entire business lifecycle.

Integrated Advisory & Support for the Lifecycle of Your Practice

>> Practice Optimization
Improve operations. Increase capacity. Support Growth.

- Decrease overhead costs
- Improve patient access and referral management
- Reduce administrative burden and rework
- Support provider productivity and efficiency
- Support scalable growth and operational excellence
- Evaluate staffing models



>> Revenue Maintenance & Cleanup
Optimize today. Capture what you've earned.

- Improve reimbursement accuracy
- Reduce billing delays and write-offs
- Increase cash flow consistency
- Strengthen compliance & documentation



>> Month-End Close Support
Get financial & operational clarity.

- Perform month-end close and reporting
- Prepare financial statements
- Analyze performance of budgeting and forecasting
- Assess financial controls risk and HIPAA compliance



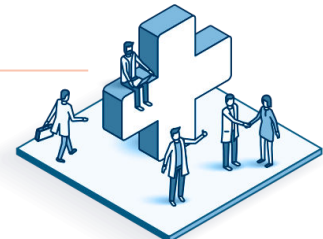
>> Visualize Data & Dashboards
See what matters. Act with insight.

- Identify margin opportunities
- Support provider productivity & KPIs
- Evaluate service line profitability
- Assess future physician need



>> Determine Your Practice's Value
Understand your true worth.

- Establish enterprise value
- Evaluate growth strategies
- Assess partnership or equity options
- Prepare for future sale discussions



>> Sell, Exit & Plan
Navigate transactions with precision.

- Quality of Earnings reports
- Transaction readiness assessments
- Investment bank & buyer relationships
- Financial diligence support
- Long-term Wealth Planning



We Understand the Complexities of the Healthcare Business

Running a successful physician-owned practice requires more than delivering exceptional patient care. It requires operational discipline, financial clarity, strategic foresight, and a long-term plan.

We work within your established strategic roadmap to elevate your processes and workflows, making them more efficient while supporting your future success.



Why Physicians Trust Whitley Penn

Measurable Results

We've produced measurable performance improvements for physician practices of all sizes.

Deep Healthcare Industry Experience

We work with physician practices and specialty groups across all stages of growth.

Integrated Advisory Capabilities

Our integrated model yields seamless collaboration across teams, and fosters cross discipline experience.

Senior-Level Engagement

You'll have direct access to experienced partners who understand your business.

Long-Term Partnership Mindset

We're invested in your success, from the growth of your business to your long-term wealth.

Proactive, Relationship-Driven Approach

We are a constant partner throughout the year, delivering ongoing insight and support.



READY TO START THE CONVERSATION?

Connect with our Healthcare Advisory team for a no-obligation discussion about where you are in your lifecycle and how we can help move your practice forward.

Whitley Penn. Your Partner in Healthcare.



KEY CONTACT

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