



**HOLT
PRACTICE
ADVISORY**

FINANCIAL CLARITY FOR PRIVATE HEALTHCARE PRACTICES

Proactive CPA & Advisory Services for
Dental, Veterinary & Medical Practice Owners



Owning a practice means wearing multiple hats — caring for patients, leading a team, overseeing operations, and running a business. Yet most doctors were never formally trained in accounting, finance, or tax strategy. Despite that, they're expected to make high-stakes financial decisions every single day.

Holt Practice Advisory provides year-round accounting, tax preparation and planning, and strategic advisory services exclusively for privately owned healthcare practices.

So you can focus on patients — not spreadsheets.

MEET LAUREN HOLT, CPA

Approachable | Responsive | Proactive

10+ years of public accounting experience

Healthcare industry specialist

Certified Public Accountant

Annual speaker at A.T. Still University

Member, Arizona Society of CPAs

Are you...

- Surprised at tax time?
- Unsure how your practice compares to industry benchmarks?
- Behind on bookkeeping?
- Wondering if you're paying too much in taxes?
- Unsure about the right balance between your wages and distributions?
- Struggling to balance patient care with practice management?

You don't have to navigate this alone.

Our Annual Advisory Model Includes:

- ✓ Accounting & Financial Reporting (QuickBooks Online)
- ✓ Business & Personal Tax Preparation
- ✓ Proactive Tax Planning & Year-End Projections
- ✓ 3-4 Strategic Planning Meetings Per Year
- ✓ Practice Acquisition & Startup Consulting
- ✓ Unlimited Phone & Email Communication
- ✓ 24 Business-Hour Response Policy

No hourly billing | No surprise invoices | No April 15th uncertainty

Why Work with a Healthcare-Focused CPA?

Healthcare practices have unique:

- ✓ Acquisition considerations
- ✓ Tax planning opportunities
- ✓ Compensation structures
- ✓ Industry benchmarks
- ✓ Profitability challenges

A general CPA may not recognize what's typical for your industry — and that can cost you.

We specialize exclusively in dental, veterinary, and medical practices so you receive proactive, industry-specific guidance.

Ready for More Than Just Tax Filing?

Let's build a financial strategy that supports your practice — and your life.

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