
PRACTICE PROFILE

PRACTICE: GENERAL

S.G.R., INC.

ADDRESS

P.O. BOX 1020
CAREFREE, AZ 85377

CONTACT INFO

PHONE: 928.275-1326 FAX: 480.488.7824
EMAIL: CONTACT@SAMREADER.COM

GENERAL INFORMATION

A. Clinic Name: _____

B. Owners Name: _____

C. Clinic Street Address: _____

D. City, State, Zip: _____

E. Cell Phone: (____) _____ Email: _____

F. Years in Practice _____ At This Location _____

G. DC'S _____ MD'S _____ DO'S _____ PT'S _____ LMT'S _____ STAFF _____ CA'S _____

H. Prop' ship _____ Part' ship _____ "S" Corp _____ "C" Corp _____ PA _____

I. Straight: _____ Mixer: _____

J. Treatment Technique _____

Primary: _____

Secondary: _____

Other: _____

K. How many patients files on hand? _____

L. Total new patients last year: _____

M. Last years average charges per visit: _____

N.. Office Statistics:

(1) Usable square feet _____ Owned _____ Leased _____ Lease Amount \$ _____

(2) Patient parking spaces: _____

(3) Free standing or multi-tenant: _____

(4) Location: _____

(5) Signage: _____

(6) Additional DC capability: _____

O. Does Doctor own other clinics? _____ Number _____

P. Attach complete listing of fees for services provided.

Q. Clinic Hours _____

RATE YOUR OFFICE

CIRCLE ONE

	Poor			Excellent	
How well equipped is your clinic?	1	2	3	4	5
Do you have enough space in your clinic?	1	2	3	4	5
Is your clinic easy to find?	1	2	3	4	5
Is your clinic on a busy street?	1	2	3	4	5
Is your clinic well marked?	1	2	3	4	5
Is your clinic visible?	1	2	3	4	5
Is your clinic accessible?	1	2	3	4	5
Does your clinic have adequate parking?	1	2	3	4	5

STAFF

NOTE: If your spouse, relatives, or any special people work for you, please indicate their relationship when filling out the information below.

Name _____ Length of Employment _____

Monthly Pay _____ Bonus Pay _____

Salary _____ Hourly _____ Contract Labor _____

Special Conditions _____

General Duties _____

Hours Required to Work _____

Doctors Personal Evaluation Poor 1 2 3 4 5 6 7 8 9 10 Excellent

Name _____ Length of Employment _____

Monthly Pay _____ Bonus Pay _____

Salary _____ Hourly _____ Contract Labor _____

Special Conditions _____

General Duties _____

Hours Required to Work _____

Doctors Personal Evaluation Poor 1 2 3 4 5 6 7 8 9 10 Excellent

STAFF - CONTINUED

NOTE: If your spouse, relatives, or any special people work for you, please indicate their relationship when filling out the information below

Name _____ Length of Employment _____

Monthly Pay _____ Bonus Pay _____

Salary _____ Hourly _____ Contract Labor _____

Special Conditions _____

General Duties _____

Hours Required to Work _____

Doctors Personal Evaluation Poor 1 2 3 4 5 6 7 8 9 10 Excellent

Name _____ Length of Employment _____

Monthly Pay _____ Bonus Pay _____

Salary _____ Hourly _____ Contract Labor _____

Special Conditions _____

General Duties _____

Hours Required to Work _____

Doctors Personal Evaluation Poor 1 2 3 4 5 6 7 8 9 10 Excellent

A. Gross Billing:2020_____2021_____2022_____

B. Gross Receipts:2020_____2021_____2022_____

C. Overhead:2020_____2021_____2022_____

NOTE: Exclude all depreciation charges and all expenditures for doctor's salary, bonus and fringe benefits (i.e. automobile, dues, and memberships, life-health-disability insurance, retirement plan contributions, etc.)

D. HMO/PPO Groups currently working with:

E. Approximate dollar amount collected from the HMO/PPO groups last year:

F. Attorneys:

G. Legal Networkers:

H. Specialized Referrals from other sources:

I. ACCOUNTS RECEIVABLE:

1. Present Balance: \$ _____

2. Aging Schedule

Current \$ _____ 91 - 120 \$ _____

31 - 60 \$ _____ 121 - 120 \$ _____

61 - 90 \$ _____ 181 Plus \$ _____

3. Receivable Profile:

Patients Direct Pay.....\$ _____

Private Insurance.....\$ _____

Workman's Comp.....\$ _____

HMO/PPO (by carrier).....\$ _____

Personal Injury.....\$ _____

Medicare/Medicaid.....\$ _____

Other.....\$ _____

J. CLINIC NET ASSETS:.....\$ _____

NOTE: Include only those assets owned or leased by the clinic. Land at cost, building net of accumulated depreciation, and furniture, fixtures, equipment, leasehold improvement and capitalized leases net of accumulated depreciation. Exclude cash, marketable securities (if any) and accounts receivable.

STATISTICAL SUMMARY 2023

Please list your practice statistics for the last 12 months

Month/Year	Collections	Services	New Patients	Total Visits
12 Month Totals				

S.G. READER & ASSOCIATES, INC. USE ONLY

COLLECTIONS RATIO	CASE AVERAGE	VISIT AVERAGE	NEW PATIENT AVERAGE	RETENTION RATIO

HMO/PPO COLLECTIONS REPORT

If you are an HMO/PPO provider, please complete the following information. If you do not have exact figures, please estimate, but be as accurate as possible. This form will be presented to qualified prospective purchasers and their advisors.

AMOUNTED COLLECTED

NAME OF PROVIDER	YEAR
PHCS	
BEECH ST.	
BLUE CHOICE	
ASHN	
AMERICA WHOLE HEALTH NETWORK	
CCN	
HNA	
CIPA	
OMNI	
CHPA	
SPN	
FCA	

PHN	
IHP	
CHPS	
AETNA	
AFFORDABLE	
ANTHEM	
CAPP-CARE	
AHP	

NOTE: If any of your figures are an estimate, please place "est." after each amount.

PRACTICE DOCTOR

N. DOCTORS BACKGROUND

1. Chiropractic College/Year _____

2. Post Chiropractic College educations _____

Doctor Observation

Practice

What do you see as the strongest two areas in your practice?

A. _____

B. _____

What do you see as the weakest two areas in your practice?

A. _____

B. _____

Doctor Observation Continued

Personal

What do you see as your two strongest attributes as they relate to your practice?

A. _____

B. _____

What do you see as your two weakest attributes as they relate to your practice?

A. _____

B. _____

Miscellaneous

Observations: _____

