

**Veterinary Business Management
And
Career Development**

Resource Reference

NOTEBOOKS AND NOTES
PROVIDED BY
Veterinary Pet Insurance

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JAMES F. WILSON, DVM, JD

James F. Wilson, DVM, JD graduated from the College of Veterinary Medicine at Iowa State University in 1967 and UCLA's School of Law in 1973. During the next 13 years in California, Dr. Wilson practiced emergency medicine, became a full partner in a small animal practice in Concord, CA, and served as a visiting lecturer at UC Davis School of Veterinary Medicine teaching veterinary law, ethics, and business management.

In 1986, Dr. Wilson moved to Pennsylvania where he served as Medical Director at the University of Pennsylvania's small animal hospital for two years. Currently, he is responsible for teaching 50 hours of course material at Penn, plus he teaches veterinary law, ethics, and/or practice management at twenty veterinary schools across the USA and the Caribbean each year.

Dr. Wilson has authored six books and over 130 articles in various veterinary journals on the subjects of veterinary law, practice management, pet health insurance, and quality ear care. His published books are *The Business Guide for Veterinary Practices* 1982, *Law and Ethics of the Veterinary Profession*, 1988, *Veterinary Receptionist's Training Manual* 1996, the 430-page *Contracts, Benefits, and Practice Management for the Veterinary Profession*, 2000, updated in 2006, *Job Descriptions and Training Schedules for the Veterinary Team* in 2005, and the 4th edition of *Legal Consents for Veterinary Practices* in 2006.

Since 1988, Dr. Wilson has been performing practice valuations and consulting with dozens of veterinary practitioners and local attorneys around the U.S. on such issues as employment contracts, personnel management and motivation, developing business plans, expert witness review of professional negligence cases and restrictive covenants, and mission/vision/core value plans for pairs or groups of potential co-owners.

The following two parties work together under the Priority Veterinary Management Consultants banner 1) operating Dr. Wilson's publishing company, Priority Press, Ltd., 2) creating teaching materials, and 3) coordinating and/or providing legal and practice management consultations for veterinarians in private veterinary practices or attorneys who work with them.

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PRIORITY VETERINARY CONSULTANTS' **BUSINESS MANAGEMENT AND CAREER DEVELOPMENT REFERENCE LIST**

Reviewed Books

1. **Handbook of Veterinary Communication Skills**

By Jenny Moffett and Carol Gray Published by Wiley-Blackwell Publishing, March 2010

This great book explaining the basics and nuances of the art of communicating with veterinary clients is destined to become the "GO TO" source for this subject, now being formally taught in half or more of today's veterinary schools. www.wiley-blackwell.com \$49.95

2. **Legal Consents for Veterinary Practices, Fourth Edition**

By James F. Wilson, DVM, JD

Copyright and Published by Priority Press Ltd., 2006, 2111 Yardley Rd., Yardley, PA 19067

Available at (215) 321-9488 and AAHA (800) 883-6301 or www.aahanet.org

AAHA members \$98.95, non-members \$116.95

The *Legal Consents for Veterinary Practices, 4th Ed.* is an essential practice management tool for the 21st century. Its use helps practices educate clients and develop and maintain good medical records. Forms serve as templates for the development of consistent hospital policies and procedures that support top-notch service and care while building valid legal defenses. All forms have Spanish translations. Supported and provided to NJVMA members by the association as a membership benefit, this resource is an excellent value. Preparing just one form and paying for its legal review would cost more than the entire book, which includes 72 forms and a CD-ROM with each form in MS Word.

The 4th edition has 27 **new** forms, including:

- lab testing prior to and side effects related to the administration of NSAIDs,
- an educational consent for clients seeking prescriptions to be filled at Internet pharmacies,
- four forms focused on the provision of core and noncore, annual and multi-year vaccines vs. performing blood titers,
- credit management policies and credit application forms, and
- individual consents for acupuncture, alternative medicine, ultrasound-guided biopsies, participation as a blood donor, necropsies, and many more.

An easy-to-use CD-ROM provides the option of customizing and printing individual forms on your own stationery from its own file on the CD or simply photocopying the ones in the book and using them as they are printed! A complete index allows you to find any form or subject quickly. The Spanish translation helps practices communicate more effectively, efficiently, and securely with their Spanish speaking clientele. In summary, this 4th Edition will help the entire health care team practice smarter, not harder.

3. **Job Descriptions and Training Schedules for the Veterinary Team**

By James F. Wilson, DVM, JD and Karen Gendron, DVM

Copyright and published by Priority Press Ltd., 2005

Available at (215) 321-9488 or (800) 883-6301 or www.aahanet.org

AAHA members \$94.95, non-members \$109.95

This 145-page book published in the summer of 2005, contains the only in-depth 7-8 page job descriptions for all positions in a small animal practice including office and practice managers. It is a "how-to" manual that provides all job descriptions and training schedules in MS Word on a CD-Rom that allows practice owners and managers to copy, delete, add, and customize task lists that instruct employees as to what they are to do and how they are to do it. Talk about not reinventing the wheel!

This is a “must buy” to enable practices to build job descriptions that can be used prior to hiring new personnel, to manage and promote or demote current support staff team members, and/or terminate those who are not completing their assigned tasks.

4. **Financial Management of the Veterinary Practice**

By Justin Chamblee, CPA and Max Reiboldt, CPA, Reviewed by Nikki L. Quennette, CPA, CMA
Published by AAHA Press, 2010, 12575 W. Bayaud Ave., Lakewood, CO 80228
Available at (800) 883-6301 or www.aahanet.org
AAHA members \$49.95, non-members \$59.95

5. **Blackwell’s Five-Minute Veterinary Practice Management Consult**

By Lowell Ackerman, DVM, DACVD, MBA, MPA
Published by Wiley-Blackwell, 2006, 111 River St., Hoboken, NJ 07030-5774
Available at (800) 434-3422 or www.wiley.com, \$104.99

New in 2006, this 650-page book provides chapters on the 13 most common practice management head aches including: analyzing the marketplace, communication, human resources, client relationships, financial, cash, administrative, and human resource management, marketing, operations, practice safety, legal issues, planning and decision-making, and facility management, design, and construction. Over 50 authors contributed their expertise to the various chapters in this book. It is a great “getting started” book with references to more in-depth resources to which readers can turn for additional information. It is truly an impressive contribution to the practice management world.

6. **Contracts, Benefits, and Practice Management for the Veterinary Profession**

By James F. Wilson, DVM, JD
Copyright and Published by Priority Press, Ltd., 2009
Available at (215) 321-9488 and AAHA (800) 883-6301 or www.aahanet.org
AAHA members \$79.95, non-members \$89.95, (students \$60 through Priority Press only)

This book is a must read for associates considering job offers or employers contemplating the hiring of associates. With 333 references, it amalgamates the opinions of practice management authors who have written in a multitude of journals on the subjects of routine and production-based compensation, and fringe benefits. More importantly, its statistical analysis of 225 contracts for terms and the frequency of over 20 different fringe benefits and mileage and year standards for restrictive covenants helps employers and employees decide what can and should be offered in employment contracts. It contains entire chapters on basics of contract law, compensation (90 pages), restrictive covenants (45pages), and the tax deductibility for employers or tax-free benefit status of the gamut of basic and other fringe benefits. Additional chapters include life, disability, and health insurance, retirement plans, the nuts and bolts of working as independent contractors, as well as the moral, ethical, and legal considerations that make or break employment relationships. A must-read for all students entering their first or negotiating subsequent employment contracts.

7. **Associate’s Survival Guide**

By Samuel M. Fassig, DVM, MA and 13 other authors
Published by AAHA Press, 2005, available at (800) 883-6301 or www.aahanet.org
AAHA members \$70.95, non-members \$82.95, student member \$59.95

This 326-page book containing a CD-Rom with vital electronic information was published in 2005. It is **THE PERFECT** book to supplement the notes in the courses that are taught through the Veterinary Pet Insurance College Career Development Teaching Program. It contains the following chapters: 1) Balancing Career, Family, and Life, Planning for Your Financial Future, 2) Understanding Debt and Debt Management, 3) Creating Your Personal Vision, 4) Creating Your Personal Employment Plan, 5) Searching for a Job, 6) Résumés, Cover Letters, and References, 7) The Art of the Interview, 8) Compensation: Salary Models and Options, 9) Mastering Negotiation, 10) Basics of the Employment Contract, 11) Making the Move,

12) When Private Practice Isn't Your Cup of Tea, 13) Mistakes Do Happen, 14) The Mentor-Your Personal Guide to Success, 15) Building Self-Confidence and Gaining Respect, 16) Why Your Boss Does That, 17) Making a Connection With Your Clients, 18) Your Performance Appraisal, 19) Employment Laws You Need to Know, 20) Getting the Most Out of Association Memberships, 21) Managing Your Time, 22) Coping With Stress and Burnout, 23) Dealing With Death and Grief on the Job, 24) Substance Abuse and Violence in the Workplace, 25) Sexual Harassment on the Job, 26) Searching for a New Job, and 27) So You Want to Be the Boss. This book, coupled with these notes can help propel all new graduates from novice beginners to educated career planners-if they will simply take the time to use all of these resources.

8. **Your Veterinary Practice: Buying, Selling & Merging**

By Byron Farquer, DVM, and Larry Wiseman, DVM

Published by Adagio Press, 2006, Santa Barbara, CA, available at

<http://simmonsinc.com/home/book.php>, \$36.95

This reference (new printing to be in print in 2009) considers whether an aspiring entrepreneur should start a practice from scratch, buy one, buy into one, or merge his/her practice with another. It also considers what sellers should do to prepare their practices for a sale. Much of it is written in a question and answer style that responds to specific issues in which all the parties have an interest. It is much more of a primer on the subject than it is a hands-on, how-to resource. Nonetheless, it should help readers consider and assess the most salient issues related to their choices for action.

9. **Low Stress Handling, Restraint and Behavior Modification of Dogs and Cats.**

By Sophia Yin, DVM, MS

Published by NerdBook, available at AAHA Bookstore and/or www.nerdbook.com. \$149 or less with various discounts that are shown on the website

This book is a must-own for every veterinary practice that treats dogs and cats. It is filled with sensational photos that illustrate every low stress restraint technique available for cats and dogs, including seven different methods for restraining cats with towels. Comes with a DVD that further illustrates the multitude of techniques depicted in the photos.

10. **The Art of Veterinary Practice Management**

By Mark Opperman, CVPM

Published by Advanstar Communications, Inc., 1999, 8033 Flint, Lenexa, KS 66214

Available at (800) 255-3808, or

www.industrymatter.com/index.asp?PageAction=VIEWPROD&ProdID=287, \$49.95

This book takes the materials Mr. Opperman talks about in the courses he teaches at 11 veterinary schools far beyond the discussions that occur during class. His chapters on client's perception of value, effective communication, the full-service hospital, team building and training, the art of delegation, avoiding the hassles of embezzlers, establishing fees, and handling accounts receivable all are written in a practical, well-organized step fashion with the use of many case examples to make help make his points interesting. A terrific primer for all students starting practices from scratch or buying in.

11. **Steps to Ownership**

By 20 different authors, edited by Terri Krantz, and Diane Lopez

Published by AAHA Press, 2002, currently unavailable

A new 175-page basic primer type of book aimed at envisioning the ownership of a practice, establishing a business plan, choosing between starting a practice vs. buying in or buying out an existing practice, the legal issues surrounding such moves, cash flow issues, the role of an architect, employment contracts, financial indicators and benchmarks, and much more. Reviewed by James F. Wilson, DVM, JD. **Out of print as of 2007 but may be available in veterinary school libraries.**

12. **Agreements Among Owners: Partners, LLC Members, and Shareholders**

By Lorraine Monheiser List, CPA, CVA

Published by AAHA Press, 1998, available at (800) 883-6301 or www.aahanet.org

AAHA members \$36.95, non-members: \$45.95

This workbook is designed for the sole practitioner who is adding another owner and for the multi-owner practice that wants to know more about planning and documenting their relationship to allow for a smoothly running practice on a daily basis. Learn how to write an agreement that protects both owners and the practice, can be used to resolve disputes, and plans for the unexpected. This publication details the factors involved and provides a checklist of items consequential to your practice.

13. **Management Basics for Veterinarians**

By Lowell Ackerman, DVM, DACVD, MBA, MPA

Published by ASJA Press, 2003, 1501 Broadway, Ste. 302, New York, NY 10036

Available at (888) 280-7715 or www.iuniverse.com

\$19.95 paperback, \$29.95 hardcover

This book serves as a primer for learning basic management principles and applying them to veterinary practices.

Chapters include: customer service, human resources, office politics, compensation and benefits, getting paid for services rendered, practicing profitably, achieving breakthrough performance, scheduling and invoicing, outfitting a practice, promotions and publicity, inventory management, and legal issues. This title is also available at www.amazon.com.

14. **Building The Successful Veterinary Practice** (3 Volume Set)

By Thomas E. Cantanzaro, DVM, MHA, FACHE, Diplomate of ACHE

Published by Wiley-Blackwell, 1997/1998, 111 River St., Hoboken, NJ 07030-5774

Available at (800) 434-3422 or www.wiley.com

Volume 1 – Leadership Tools, 180 pages, \$36.99

Volume 2 – Programs and Procedures, 372 pages, \$59.99

Volume 3 – Innovation & Creativity, 374 pages, \$64.99

Volume 1 – Leadership Tools outlines the necessary skills and values one should have in order to be an effective veterinary leader. Cantanzaro does this by offering various team building methods and ideas of leadership qualities in addition to putting forth the idea of continuous quality improvement (CPI), a management concept where leaders "nurture" the accountability for specific areas of improvement to individual staff members in addition to hiring those who are capable of being nurtured. This volume contains a great deal of "leadership theory," however, it is relatively quick and easy reading.

Volume 2 – Programs & Procedures builds on the leadership skills outlined in Volume 1 and applies them to implementation of some programs and procedures. Here Cantanzaro bridges the gap between theory and the practical. He starts off defining "the new American practice" and then moves towards a pragmatic discussion of medical records management, budgeting, marketing, and performance appraisals. Also included is an appendix containing sample forms, fiscal report and budget formats, and performance evaluation guidelines.

Volume 3 – Innovation & Creativity presents concepts, tools, and exercises to help foster the motivation, excitement, and an attitude towards change and adaptability which is advantageous in an atmosphere of a changing times. The emphasis of this volume is on taking what has been learned in the previous volumes and putting it to creative use.

This three-volume set is well written and stimulates patterns of thought on topics of leadership and management in a veterinary context. If you are looking for "cookbook" ways to improve your bottom line these books are not for you.

However if you are interested in self improvement, management theory, and some abstract thoughts on veterinary practice management these books are a useful choice.

15. **Choosing the Right Form of Business for Your Practice**

By Lorraine Monheiser List, CPA, CVA and Cheryl R. Harmel, CPA
Published by AAHA Press, 1998, available at www.amazon.com, \$39.00

Whether you are starting a new business or considering changing your current form of business, this publication deals with the differences between a sole proprietorship, partnership, and corporation, and which is best for you. Tax options and financial concerns are also fully explored. The publication lists a number of items for your evaluation so that you can easily determine which business form meets your needs.

16. **Financial & Productivity Pulsepoints, Fifth Edition**

By AAHA with contributing author Karen Felsted, CPA, MS, DVM, CVPM
Published by AAHA Press, 2009, available at (800) 883-6301 or www.aahanet.org
AAHA members \$120.95, non-members \$151.95

A comprehensive survey and analysis of performance benchmarks for numbers of staff per practice, gross incomes of practices, productivity and ACTs for practices and individual veterinarians, and routine practice expenses including drugs, lab, veterinary and support staff salaries, employee benefits, rent, owner draws, and owner net income by 25th, median, average, and 75th percentiles. This publication is essential for anyone who is assembling a business plan. Newest edition 2005.

17. **Marketing Your Veterinary Practice II**

By Shawn P. Messonnier
Published by Mosby, 1997, 11830 Westline Industrial Dr., St. Louis, MO 63146
Available at (800) 545-2522 or www.us.elsevierhealth.com 176 pages, \$45.95

This relatively short paperback is devoted solely to marketing. For a short book, it is particularly well-indexed so that it is easy to find specific information. Marketing concepts are introduced from the viewpoint of internal and external marketing. Major points are well emphasized. The book can be perused for points of interest. A wide variety of marketing techniques are presented including the use of a practice newsletter. Of particular interest is Chapter 10 where the author presents six marketing scenarios. These are well-organized discussions which include marketing objectives, targets, competition, budget, and strategy. While not a detailed review, this book is well suited for beginners who want a reasonable start to understanding and developing marketing techniques for veterinary practices. The appendix is particularly useful in summarizing resources for marketing products from stationary to educational videos.

18. **Mastering the Marketplace: Taking Your Practice to the Top**

By Ross Clark, DVM
Published by Advanstar Communications, Inc., 1999, 8033 Flint, Lenexa, KS 66214
Available at (800) 255-3808, or
www.industrymatter.com/index.asp?PageAction=VIEWPROD&ProdID=288, 354 pages and Practice Workbook, \$89.95

Filled with a wealth of practical knowledge and clear explanations of general concepts necessary for the veterinary practitioner to build a successful business. Well written and includes chapters written by MBAs, accountants, hospital managers, and other veterinarians as well as compilations from current writings on business theory. The author focuses on taking a "goal oriented" approach to practice management. Everything from mission statements, partnerships, and financial planning to staff hiring, training, and record keeping is covered. There is an emphasis on efficiency, cost effectiveness, self evaluation, and communication as well as demonstrating how to take a service oriented approach to satisfying your client's needs as well as your employees.

The accompanying Practice Workbook is very practical and includes things such as contracts, job descriptions, a policy manual, procedures, and checklists, all of which are extremely useful and freely reproducible. This book and workbook a must buy.

19. **Personal Financial Planning for Veterinarians**

By Lorraine Monheiser List, CPA, CVA

Published by AAHA Press, 1998, available at www.amazon.com, \$39.00

A good financial plan can help you define your financial needs and set goals to meet those needs. This publication covers several areas of financial planning including insurance, education, business, home and auto buying, and investment planning and provides veterinary specific examples that will assist you with the financial planning process.

20. **Selecting the Right Retirement Plan for Your Practice**

By Lorraine Monheiser List, CPA, CVA

Published by AAHA Press, 1998, available at www.amazon.com, \$23.00

Retirement is an important issue in business, for you personally and for your staff. Even though tax laws are complex and confusing, a well-planned and well-executed retirement program can still provide for your future financial security. This publication offers straight-forward, easy to understand plans that can work for you and your practice.

21. **Selling Your Practice: Issues and Answers**

By Lorraine Monheiser List, CPA, CVA

Published by AAHA Press, 1998, available at (800) 883-6301 or www.aahanet.org

AAHA members \$36.95, non-members \$45.95

This in-depth analysis details pertinent information for the sale of your practice, beginning with the posturing of the practice, this practice takes you through the process, including pricing your practice, selecting a buyer, negotiating techniques, structuring the sale, and planning for the tax implications

22. **Structuring an Associate Buy-In**

By Lorraine Monheiser List, CPA, CVA

Published by AAHA Press, 1998, available at www.amazon.com, \$45.95

An associate buy-in involves many considerations that will factor into your life, professionally and personally. This publication will help owners and associates better understand such issues as understanding the financial aspects, agreeing on control issues, within daily practice, tax-related topics, and the long-term implications of a buy-in.

23. **The Veterinary Fee Reference, Sixth Edition**

Authored and published by AAHA Press, 2009

Available at (800) 883-6301 or www.aahanet.org, AAHA members \$132.95, non-members \$159.95

An absolutely essential reference to fees in small animal practices and emergency clinics based on 25th, median, 75th, and highest reported fees for 10 regions of the country. A wonderful assessment of fees for individual and “bundles” of services. Newest edition 2009.

24. **Valuation Essentials for Veterinarians**

Authored by the Veterinary Valuation Resource Council of VetPartners™

Available to VetPartners™ members and the public at no charge at www.vetpartners.org

25. **Valuation of Veterinary Practices**

By Lorraine Monheiser List, CPA, CVA

Published by AAHA Press, 1998, available at (800) 883-6301 or www.aahanet.org

AAHA members \$36.95, non-members \$45.95

This publication is not designed to make appraisers out of veterinarians, but rather to provide insight into the issues inherent in veterinary practice valuation. Designed for both current owners and potential buyers, the workbook provides background information on valuation theory, information on appraisers and tips on how to work effectively with one, and guidelines for evaluating a report prepared by another appraiser.

NOTE: The most complete catalogs of books on practice management topics are the 65 page AAHA Press Catalog available at (800) 883-6301 or by sending an e-mail to catalogrequest@aaahanet.org and Advanstar Veterinary Healthcare Communications catalog available at (800) 598-6008.

References on Compensation and Benefits

26. **Compensation & Benefits, 6th Edition.**
Authored and published by AAHA Press, 2010, available at (800) 883-6301 or www.aaahanet.org
AAHA members \$99.95, non-members \$119.95

27. **AVMA Report on Veterinary Compensation – 2011 Edition**
By AVMA
Published by AVMA, 2011, 1931 N. Meacham Rd., Ste. 100, Schaumburg, IL 60173
Available at (800) 248-2862 or <http://www.avma.org/reference/marketstats/compensation.asp> (click Ordering Information once at this site to purchase)
AVMA members \$59, non-members \$84

28. **2007 Compensation and Benefits Survey**
By VHMA
Published by VHMA, 2008, P.O. Box 2280, Alachua, FL 32616-2280, (877) 599-2707,
www.vhma.org, admin@vhma.org
Available FREE to VHMA members, not available to non-members

Additional Management Books **(Including Personnel Management)**

29. **Emotional Intelligence: 10th Anniversary Edition; Why It Can Matter More Than IQ,** 2005 and **Working With Emotional Intelligence,** 2000
By Daniel Goleman
Published by Bantam, 1745 Broadway, New York, NY 10019
Available at www.amazon.com, \$12.24 paperback, \$19.14 hardcover

The first of these books listed is an update of the 1997 original, and contains an additional 16 pages. These books are outstanding new works showing that IQ is remarkably less important in the workplace than “EI,” emotional intelligence. Furthermore, whereas IQ comes with the employee and cannot be changed, EQ or EI can be developed through proper training. Businesses with employees that possess emotional intelligence focus on empathy, teamwork, and adaptability to change. While IQs have risen 24 points since 1970, the EI of the work force has dropped. A MUST READ to understand what’s happening with the workforce and how to implement changes that improve employee productivity and morale.

30. **Law and Ethics of the Veterinary Profession**
By James F. Wilson DVM, JD
Published by Priority Press Ltd., 1993, available at (215) 321-9488, 532 pages, \$80.00

Written first and foremost by a veterinarian who also happens to be an attorney, this is a wonderful resource for all veterinarians. The author knows intimately the critical legal issues encountered by veterinarians, and thus, has addressed all of these thoroughly.

It is helpful not only for dealing with medical issues and legal concerns thereof, but is also very for the establishment of a veterinary practice. It provides guidance on medical record content, legal requirements and implications; billing, credit management, and debt collection; advertising; ethical issues; and contracts. Thus, this is a resource that will continue to be valuable even beyond the establishment of one's veterinary practice. In fact, this is one is nearly essential, whether or not you are starting your own practice!

31. **Managing for Dummies, Second Edition**

By Bob Nelson and Peter Economy

Published by For Dummies, 2003, available at www.amazon.com, 384 pages, \$14.95

This is a general treatment of managing concepts spanning from leadership to terminating employees. The main points are emphasized and are applicable to a broad range of businesses, including veterinary practice. The book is well-organized, readable, and the concepts are basic but not so elementary as to be obvious. A great deal of attention is paid to inspiring and handling employees, something we do not often discuss in school, but is necessary in our practices.

32. **The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change**

By Steven R. Covey

Published by Simon & Schuster, 2004, available at www.amazon.com
384 pages, \$9.57 paperback, \$21.95 hardcover

This is an excellent book for helping you step back and critically evaluate your life, personality, and overall approach to work and problem solving. It helps you to target your weaknesses, and step-by-step, guides you to a more rational and productive approach towards life and relationships, unquantifiably essential elements for a successful career and home life. While this book is not a direct resource for building a veterinary practice, it is a fundamental resource for success in any endeavor. It is highly motivational and has much to contribute to your personal growth, no matter who or where you are.

33. **Thriving on Chaos: Handbook for a Management Revolution**

By Tom Peters

Published by Harper Paperbacks, 1991, 10 E. 53rd St., New York, NY 10022
Available at (212) 207-7000 or www.harpercollins.com, 736 pages, \$21.00

This is a combination of an information and self-help book that approaches management from a proactive viewpoint. It informs and inspires the reader. Each chapter concludes with a list of steps to improve the reader's management skills and summary of the major concepts of the chapter. The book is marked by enthusiasm and the concepts of fairness and quality in the workplace. It explores the interrelationships between workers, and the responsibility of managers as true leaders. While product-oriented and not directly related to veterinary medicine, the concepts are inspiring if not somewhat idealistic. This makes this a readable and worthwhile general text.

34. **U.S. Pet Ownership and Demographics Sourcebook**

Authored and published by AVMA, 2007, 1931 N. Meacham Rd., Ste. 100, Schaumburg, IL 60173
Available at www.avma.org, AVMA member/library \$189.00, non-member \$279.00

An excellent general reference for learning about the character and expectations of America's pet population. This sourcebook is filled with large tables and diagrams illustrating a variety of data on America's pets and pet owner population. These are clear, easy to interpret, and furthermore, well explained for you within the context of each chapter. Formulas are provided within one section to estimate the population of pet-owning households and number of pets within a particular community. This is a very useful resource for determining a good location for your interests as well as for marketing strategies.

Other Non-reviewed Books

1. **AVMA Products Division**, Has staff training workbooks on topics such as Telephone Courtesy & Client Service and Client Satisfaction, numerous clients hand outs and other marketing material. 1931 N. Meacham Rd., Ste. 100, Schaumburg, IL 60173-4360, (847) 925-8070, www.avma.org/products.
2. **Blanchard, Ken**, The One Minute Manager, Putting the One Minute Manager to Work, The One Minute Manager Meets the Monkey and Empowerment Takes More Than a Minute. These are available at most book stores or from www.amazon.com. These are among the most easily read and valuable personnel management books on the market. Can be read in 45-minutes each and will produce lessons for a lifetime.
3. **Gendron, Karen, DVM**, A Practical Guide to Performance Appraisals, AAHA Press, \$67.95 for AAHA members, \$80.95 for non-members.
4. **Heinke, Marsha DVM, EA, CPA, CVPM and McCarthy, John, DVM, MBA**, Practice Made Perfect – A Guide to Veterinary Practice Management, AAHA Press, 2001. AAHA members \$88.95, non-members: \$104.95.
5. **Riegger, Michael, DVM, ABVP**, Management for Results and More Management for Results, Advanstar Communications, 1992, 1995. These books are currently out of print but may be available in libraries or on the secondary market. Dr. Riegger can be reached at Northwest Animal Clinic & Hospital in Albuquerque, NM at (505) 898-1491.
6. **Smith, Carin, DVM**, Team Satisfaction Pays, Smith Veterinary Services, 2010. The definitive resource for organizational and team development in veterinary practice. Action lists and team exercises included in every chapter. (509) 548-2010, www.smithvet.com. \$197.00 plus \$5.00 shipping and handling.
7. **Smith, Carin, DVM**, Client Satisfaction Pays, AAHA Press, 2009, \$49.95 for AAHA members, \$59.95 for non-members. This classic has been revised, updated, and improved for today's veterinary team. It helps you understand the client experience and teaches you ways to make it more pleasant, even exceptional. Happy clients mean a happier staff and a more successful practice. Getting it right comes from getting your entire staff to participate in the client satisfaction process. A good source of practice management information for both established practices and new hospitals. The chapters dealing with client relations are especially helpful. www.smithvet.com
8. **Smith, Carin, DVM**, The House Call Veterinarian's Manual, Smith Veterinary Services, 2007. This resource was updated in 2007. It contains practical information for the new business owner and the experienced practitioner gathered from interviews with house call veterinarians all over the country. (509) 548-2010, www.smithvet.com. \$129.00 plus \$5.00 shipping and handling.
9. **Smith, Carin, DVM**, FlexVet: How to Be One, How to Hire One: The Comprehensive Practice Guide for Relief and Part-time Veterinarians, Smith Veterinary Services, 2006. Guide for practice owners to assess the needs of their practice and for veterinarians who desire more flexibility or choice, including self-assessment quizzes on the need for this position in your business. (509) 548-2010. \$134.00 plus \$5.00 shipping and handling. www.smithvet.com

Staff Training References

1. **The Veterinary Receptionist's Training Manual**
By James Wilson, DVM, JD and Carol McConnell, DVM
Published by AAHA Press, 2002, available at (800) 883-6301 or www.aahanet.org
AAHA members \$93.95, non-members \$115.95

A 153-page notebook filled with receptionist training ideas. Included is a CD-Rom with the entire manual in Microsoft Word and Word Perfect so practices can easily create manuals that are customized to fit their own policies and needs.

2. **Creating the Veterinary Experience**

By Ernest Ward, Jr., DVM

Published by E³ Management, 2000, 9256 Beach Dr., Calabash, NC 28467

Available at (910) 579-5550 or www.e3management.com, \$180.00 plus shipping and handling

This workbook and videotape package serves as a great resource for client hand outs and staff training. One of the workbook and video sections presents excellent staff training materials covering telephone technique, the welcome experience, scheduling appointments, the new client, new pet, and senior pet experience, counseling clients prior to surgical or dental admissions, the hand-off of patients from technicians to receptionists at the time of a patient's release, and euthanasia.

3. **Teams That Work**

By Mary Ann Vande Linde, DVM

Published by AAHA Press, 2004, available at (800) 883-6301 or www.aahanet.org

AAHA members \$88.95, non-members \$98.95

This engaging staff training program on CD-Rom is designed to help you and all members of your practice team work through conflicts by learning more effective ways of interacting with clients and other staff members. By examining a variety of realistic case studies, staff members will gain valuable insights about their own communications styles, learn techniques for preventing conflicts, and become better conflict managers.

4. **Exam Room Communication**

Sheila Grosdidier

Published by AAHA Press, 2004, available at (800) 883-6301 or www.aahanet.org

AAHA members \$88.95, non-members \$98.95

This CD-Rom provides real life scenarios, worksheets, and explanations for practical, goal oriented, ways to improve listening skills and communication techniques. It is fully narrated and includes interactive exercises that allow staff to immediately apply new information as well as tips for adapting to different client personality types.

5. **Animal Care Training Programs**

By David Grant, DVM, President ACT

2701 Hartlee Field Rd., Denton, TX 76208, (800) 357-3182, info@4act.com

Go to www.4act.com/home.htm, highlight Staff Training, and click on Overview where the following programs exist:

Veterinary Foundations, Kennel Assistant Training, Receptionist Training, Veterinary Assistant Training – Part 1, Veterinary Assistant Training – Part 2, Management Training, and Technician Skills

This company has produced a series of DVDs such as The Complete Staff Training Resource, Management Training, and Technician Skills, for training 1) receptionists, 2) kennel assistants, 3) veterinary assistants, 4) managers, and 5) technicians to have a basic understanding of veterinary medicine and veterinary practice. This series features well written text and concepts, excellent people playing the parts of clients and staff, valuable bullet points to emphasis the learning process, and questions that must be answered through interactive measures in order to move to further sections of the training program. Altogether, ACT offers 30 hours of training in 56 DVD titles with workbooks on CD-Rom and online testing for \$1,200 to \$1,800.

6. **Lifelearn's Veterinary Staff Training Series**

Available at (800) 375-7994, www.lifelearn.com, sales@lifelearn.com

This company has developed a series of staff training products available as one-hour, self-paced, interactive, and engaging CD-Roms including the topics Animal Handling and Restraint, Cornerstones of Compliance, Dental Compliance, Enhancing Your Telephone Skills, Essentials of Client Service, Exam Room Communication, Lifelearn Nutrition, Marketing Veterinary Products & Services, Nutrition Basics, Nutritional Compliance, Pain Management Compliance, Parasite/Zoonotic Disease Management, Perception of Value, Safety in the Veterinary Practice, Smart Moves for Technicians and Assistants, Surgery Basics, Teams That Work, Understanding Dental Hygiene, Understanding Heartworm Infection, Understanding Intestinal Parasites, and Vaccination Basics.

Journal Publications

1. **DVM Newsmagazine**

Advanstar Communications, 8033 Flint, Lenexa, KS 66214

Available at (800) 255-3808, www.dvm360.com

This monthly publication is the leading news magazine explaining what is going on legally, politically, and with new forms of business and products, in the veterinary profession.

2. **AAHA Trends**

AAHA, available at (800) 883-6301 or www.trends.aahanet.org/eweb

AAHA members Free, non-members \$60.00, student non-members \$30.00

This bimonthly publication features articles on significant management trends, industry news, and issues in the veterinary profession. It's a great publication with interesting articles on the veterinary community with more useful information for those owning or managing a practice.

3. **Veterinary Economics**

Advanstar Communications, available at (800) 255-3808, www.dvm360.com

Practicing vets/4th year vet students Free, Other vet students \$21.00, non-practicing vets \$42.00

This monthly publication is written by veterinarians and leaders in the areas of veterinary practice management, finance, law, and accounting. It is loaded with information and articles on building, buying, financing, managing, marketing, and selling a veterinary practice in addition to career issues for veterinary students and veterinarians. It's a must for current or potential practice owners and managers as well as for veterinary students.

CPA's Who Specialize in Veterinary Medicine **Those in Bold Also Perform Practice Appraisals**

1. **Fegley, Bill, CPA**, Fegley and Associates, 2250 Hickory Rd., Ste. 20, Plymouth Meeting, PA 19462, (610) 825-7400, www.fegley-assoc-cpa.com, billf@fegley-assoc-cpa.com. Has taught taxation to veterinary students with Dr. Wilson for 16 years. Handles CPA, tax work, and appraisals for dozens of veterinary practices.
2. **Gatto, Louis, CPA, McFerson, Tom CPA, ABV**, Gatto McFerson CPAs, 528 Arizona St., Ste. 201, Santa Monica, CA 90401, (310) 393-2434, www.gattomcferson.com, lou@gattomcferson.com, tom@gattomcferson.com. This firm has hundreds of veterinary clients and 25 years of experience handling CPA work, practice appraisals, and negotiations for sales and purchases of veterinary practices.

3. **Glassman, Gary, CPA**, Burzenski & Company, 100 S. Shore Dr., Mariner's Pt., East Haven, CT, (203) 468-8133, www.burzenski.com, gary@burzenski.com. Has 20 years of experience and over a hundred veterinary clients for whom this firm provides CPA services.
4. **Lacher, Carl, CPA**, Lacher McDonald & Co., CPAs, 5666 Seminole Blvd., Ste. 1, Seminole, FL 33772, (888) 884-1506, www.lachermcdonaldcpa.com/cpa, carl@lachercpa.com. Provides appraisal, accounting, and tax services for dozens of veterinary practices, especially those in equine medicine.
5. **Heinke, Marsha, DVM, EA, CPA CVPM**, 934 Main St., Grafton, OH 44044, (440) 926-3800, www.drmarshaheinkecpa.com, marsha@drmarshaheinkecpa.com. Twenty years as an author, speaker, and consultant on business issues, accounting, and tax work plus practice management consultations.
6. **Wutchiett, Cynthia, CPA and Tumblin, Denise, CPA**, Wutchiett Tumblin and Associates, 3200 Riverside Dr., Columbus, OH 43221-1725, (614) 486-9700, www.wellmp.com, cwutchiett@wellmp.com, dtumblin@wellmp.com. Twenty years experience proving accounting and tax work for veterinary practices as well as speaking and writing about these subjects.
7. **House, Tyler, CPA**, Weaver Call, PC, 7135 Highland Dr., Ste. 201, Salt Lake, UT 84121, (801) 947-1788, www.weavercall.com, tyler@weavercall.com. Has developed expertise serving small and large veterinary hospitals primarily in Utah.
8. **Niergarth, Brad, CPA**, Dennis, Gartland & Niergarth CPAs, 415 Munson Ave., P.O. Box 947, Traverse City, MI 49686, (231) 946-1722, www.dgncpa.com, info@dgncpa.com. Serves multiple veterinary clients in northern Michigan.
9. **Quenette, Niki, CPA**, Quenette Veterinary Consulting, 29676 Riverview Rd., Fergus Falls, MN 56537, (701) 388-8987, www.quenetteveterinaryconsulting.com, nikki@quenetteveterinaryconsulting.com. She is pursuing specialization in accounting for equine practices.
10. **List, Lorraine Monheiser, CPA, CVA**, Summit Veterinary Advisors, LLC, 10354 W. Chatfield Ave., Ste. 103, Littleton, CO 80127, (303) 980-4000, www.summitveterinaryadvisors.com, lorraine@summitveterinaryadvisors.com.

Practice Management Consultants **Specializing in Veterinary Medicine**

1. **VetPartners**, The membership directory of this association is the best reference for resources in this category. Formed in 2001, this group consists of over 200 members who consult and advise on a regular basis within the veterinary industry. Association Administrator, Kathryn Ziemak, CMP, P.O. Box 121625, Clermont, FL 34715, (352) 243-2014-phone, (352) 243-2013-fax, www.vetpartners.org, info@vetpartners.org. See the VetPartners website for mission, vision, activities, and a membership directory that shows each member's special areas of interest and expertise.
2. **Opperman, Mark, CVPM**, Veterinary Management Consultation, Inc., 30792 Southview Dr., Ste. 200, Evergreen, CO 80439, (303) 674-8169, www.vmc-inc.com, mopperman@vmc-inc.com.
3. **Wilson, James F., DVM, JD**, Priority Veterinary Management Consultants, 2111 Yardley Rd., Yardley, PA 19067, (215) 321-9488, www.pvmc.net, jfwdvmjd@verizon.net. Practice management consultants, practice appraisals, operational audits, financial budgets and forecasts, assisting with development of business plans, and employment contracts issues.

4. **Remillard, James, MPA, CPC, CVPM**, Remillard Management Associates, Inc., 1971 American River Trail, Cool, CA 95614-2132, (530) 885-6113, www.remillardmanagement.com, jimremillard@remillardmanagement.com. He is a practice management consultant and appraiser specializing in all phases of practice management consulting.
5. **Dunn, Louise**, Snowgoose Veterinary Management Consulting, 12 Snowgoose Cove, Greensboro, NC 27455, (336) 286-0878, snogoose@infionline.net.
6. **Dowdy, Tracy, CVPM**, Management Resource Group, 3000 Hwy. 121, Bedford, TX 76021, (817) 966-9369, www.mrgconsult.com, tdowdy@mrgconsult.com. Speaker on client service, staff development and empowerment, human resource management, management development and leadership. General practice management consulting in financial management, organization, standards of services, human resource development.
7. **Hornik, Jim**, Integrated Planning Services, Inc., 22284 W. 176th St., Olathe, KS 66062, (913) 686-4572, www.ipsplanners.net, ips@ipsplanners.net. Demographic analyses for businesses, assistance with business plans, and special interest in and experience with emergency clinics and specialty care facilities.
8. **Gatto, Louis, CPA, McFerson, Tom CPA, ABV**, Gatto McFerson CPAs, 528 Arizona St., Ste. 201, Santa Monica, CA 90401, (310) 393-2434, www.gattomcferson.com, lou@gattomcferson.com, tom@gattomcferson.com.
9. **Gavzer, Karyn, MBA, CVPM**, KG Marketing & Training, Inc., 85 Myers Farm Ct., P.O. Box 322, Springboro, OH, 45066, (937) 748-1156, www.karyngavzer.com, kgavzer@aol.com. Speaker and consultant with two decades of experience specializing marketing, strategic planning, client perception of value and staff training.
10. **Guenther, Jim, DVM, MBA, MHA, CVPM**, Strategic Veterinary Consulting, Inc., P.O. Box 19720, Asheville, NC 28815, (828) 298-7177, reachdoc@bellsouth.net.
11. **Lynch, Thomas, MA**, Veterinary Healthcare Consultants LLC, 200 Merrimack St., Ste. 301, Haverhill, MA 01830, (800) 467-0627, www.vhc.biz, tom@vhc.biz, info@vhc.biz.
12. **Snyder, Gerald, VMD**, Veterinary Productivity, Inc., (800) 292-7995, www.veterinaryproductivity.com, vethelp@comcast.net. General practice management consulting, especially demographic studies of trade area fees for new veterinary practices.
13. **Lowder, Gwen**, VetMgrCentral, P.O. Box 178951, San Diego, CA 92177-8951, (858) 279-6553, www.vetmgrcentral.com, glowder@vetmgrcentral.com.

Financial Management Consultants **Specializing in Veterinary Medicine**

1. **Wood, Fritz, CPA, CFP**, H.F. Wood Business & Financial Consulting, 520 Terrace Trail E., Lake Quivira, KS 66217, (913) 631-0303, www.fritzwood.com, fwood@kc.rr.com. Personal financial planning expert.
2. **Metzger, Tim, DVM, CFP**, Metzger Wealth Management, 1872 La Cuesta Dr., Santa Ana, CA 92705, (714) 832-8686, timothybigguy@sbcglobal.net.
3. **Hall, Terry, DVM, CFP**, Terry Hall & Associates, 385 Inverness Pkwy., Ste. 230, Englewood, CO 80112, (303) 734-9500, (303) 799-0505-fax, www.terryhallassociates.com, terry@terryhallassociates.com.

Practice Appraisers and/or Brokers Who Sell Practices

Whenever possible, seek assistance from veterinary practice appraisers who are members of the VetPartners Practice Valuation Committee. This group of approximately 12 people have hosted monthly conference calls to help develop benchmarks, strategies, and reports that will provide consistency to the appraisal process.

1. **McCormick, Larry, DVM, MBA, CBA, McCormick, David, MS, REALTOR**, Simmons & Associates Mid-Atlantic, 203A E. Miller Ln., Boalsburg, PA 16827, (888) 881-7084, www.simmonsinc.com/home/regions/midatlantic.php, lmccormick@tmccg.com, dmccormick@tmccg.com. Serving NJ, PA, DE, MD, VA. Member VetPartners, Dr. McCormick is founding member of VetPartners and Practice Valuation Committee.
2. **Gatto, Louis, CPA, McFerson, Tom CPA, ABV**, Gatto McFerson CPAs, 528 Arizona St., Ste. 201, Santa Monica, CA 90401, (310) 393-2434, www.gattomcferson.com, lou@gattomcferson.com, tom@gattomcferson.com. This firm has hundreds of veterinary clients and 25 years of experience handling CPA work, practice appraisals, and negotiations for sales and purchases of veterinary practices.
3. **Guenther, Jim, DVM, MBA, MHA, CVPM**, Strategic Veterinary Consulting, Inc., P.O. Box 19720, Asheville, NC 28815, (828) 298-7177, reachdoc@bellsouth.net. Member VetPartners and its Practice Valuation Committee.
4. **Farquer, Byron, DVM**, Simmons & Associates Pacific, 11737 Twenty Six Mile Rd., Oakdale, CA 95361, (877) 315-1954, www.simmonsinc.com/home/regions/pacific.php, pacific@simmonsinc.com.
5. **Goebel, Richard, DVM**, Simmons & Associates Great Lakes, 5889 Richey Park Ln., Monticello, IN 47960, (888) 746-3717, www.simmonsinc.com/home/regions/greatlakes.php, greatlakes@simmonsinc.com. Member VetPartners
6. **Gerber, David, DVM**, Simmons & Associates Northwest, 1040 N. 23rd St., Coeur d'Alene, ID 83814, (800) 846-0062, www.simmonsinc.com/home/regions/northwest.php, northwest@simmonsinc.com
7. **Pinkleton, Randy, DVM**, VetNetAmerica, 3612 Rives Rd., Petersburg, VA 23805, (877) 838-6384 www.vetnetamerica.com, rpinkleton@vetnetamerica.com
8. **Lynch, Thomas, MA**, Veterinary Healthcare Consultants LLC, 200 Merrimack St., Ste. 301, Haverhill, MA 01830, (800) 467-0627, www.vhc.biz, tom@vhc.biz, info@vhc.biz.
9. **Wattles, Ellie, DVM, Wattles, Rick, DVM**, Pacific Professionals Inc., 533 Sespe Ave., Ste. A, Fillmore, CA 93015-1916, (805) 524-3195, www.pacificproinc.com, pacproinc@aol.com.

Commercial Real Estate Appraisers

1. **Pomykacz, Mark, MAI, MRICS, Federal Appraising & Consulting**, 460 Route 22 West, Ste 403, Whitehouse Station, New Jersey 08889, Provided real estate and business valuation consulting services including banking support, mergers & acquisitions due diligence, capital markets services, valuation services for tax and audit issues, litigation support, appraisals, and other consulting services. Clients included many Fortune 1,000 companies, REITs, Wall Street banking firms, and law firms.

Architects Specializing in Veterinary Medicine

Start with a trip to <http://veterinaryhospitaldesign.dvm360.com/vethospitaldesign>. This is the Veterinary Economics website that provides materials relating to hospital design. Next, plan on attending the Hospital Design Conference at Central Veterinary Conference in Kansas City each August where you can meet most of the architects you see below. You can even have a free one-hour review of your existing plans while attending this meeting.

1. **Hafen, Mark**, Animal Arts/Gates Hafen Cochrane, 735 Walnut St., Boulder, CO 80302, (800) 332-4413, www.animalarts.biz, info@animalarts.biz.
2. **Copich & Associates, Inc.**, 314 Churchill-Hubbard Rd., Youngstown, OH 44505, (330) 759-0226 www.copich.com, copich@sbcglobal.net.
3. **Rauhaus Freedenfeld & Associates, LLP**, East coast office – 97 Broadway, Boston, MA 02116-5311, west coast office – 23101 Moulton Pkwy., Ste. 106, Laguna Hills, CA 92653, (800) 426-2557, www.rfarchitects.com, info@rfarchitects.com.
4. **Knapp Schmidt Architects, LLC**, P.O. Box 762, Wautoma, WI 54982, (800) 236-0140 www.ksarch.net, ksarch@earthlink.net. This firm also performs demographics profiles for sites of existing practices for sale or new ones veterinarians plan to build.
5. **BDA/CMP**, 901 Lambertson Pl. N.E., Albuquerque, NM 87107, (800) 247-5387, www.bdacmp.com
6. **Architectural Werks, Inc.**, 11335 N.E. 122nd Way, Ste. 140, Kirkland, WA 98034-6919, (425) 823-2244, www.awerks.com, info@awerks.com. Specializing in veterinary services since 1969.
7. **Crosby Longo Architecture Studio, LLC**, Lafayette, LA, (337) 281-2155, New Orleans, LA, (504) 913-6330, www.crosbylongo.com, clas@crosbylongo.com.

Practice Merger Specialists

1. **Kendall, Tom, DVM, CVPM**, 1823 Fulton Ave., Sacramento, CA 95825, (916) 485-5412, www.ardenanimalhospital.com, tkendall@aol.com. Has experience with successful and unsuccessful mergers of practices primarily in CA.

Financing Real Estate Ventures for Veterinary Practices

1. **American Pet Care Properties**, R. Scott Christian, Founder and CEO, 6160 S. Syracuse Way, Ste. 105, Greenwood Village, CO 80111, (303) 798-6900, www.petcareproperties.com, scott@petcareproperties.com. This company features a “built to suit” program for business owners wishing to build new veterinary hospitals or boarding kennels, or significantly remodel existing facilities.

Attorneys Specializing in Veterinary Medicine

1. **American Veterinary Medical Law Association**, 1666 K St., Ste. 260, Washington, D.C. 20006, admin@avmla.org, www.avmla.org, For a source of all the attorneys, many of whom also are veterinarians, and all of whom have a special interest in veterinary legal issues contact this association.

2. **Tanella, Peter, Esq.**, Mandelbaum, Salsburg, Gold, Lazris, Descenza & Steinberg, 155 Prospect Ave. West Orange, NJ 07052. www.thevetalliance.com 973-736-4600. Member of Veterinary Resource Alliance, a group of business specialists whose focus is helping veterinarians with all types of business start-up and acquisition issues. Peter's law firm in New Jersey has over 50 attorneys who can help with almost all veterinary business legal issues.
3. **Lacroix, Charlotte A., DVM, Esq.**, Veterinary Business Advisors, Inc., Countryside Plaza N., Bldg. E, Ste. 1403, 361 Rte. 31, Flemington, NJ 08822, (908) 782-4426, www.veterinarybusinessadvisors.com, clacroix@veterinarybusinessadvisors.com. Specializes in employment contracts, drafting offers of purchase and/or sale, creating new business entities, and employment law issues. Member VetPartners and AVMLA
4. **Landis, Michael, Esq.**, Smolow & Landis, 2 Neshaminy Interplex, Trevoze, PA 19053, (215) 244-0880, www.smolowlandis.com, mlandis@smolowlandis.com. Specializes in business and contract law with emphasis on helping to negotiate agreements and drafting documents related to purchases and sales of veterinary practices; represents veterinarians in PA and NJ state board complaints. Member AVMLA
5. **Cutler, Trey, Esq.**, 919 Milan Terrace, Ft. Collins, CO 80525, (970) 282-7747, www.cutlerlaw.net, tcutler@cutlerlaw.net. Operates his own private practice, advising clients in the purchase and sale of veterinary practices, choice of entity issues, practice buy-ins, buy-sell agreements, employment contracts, restrictive covenants, production-based compensation agreements and other legal matters. Over 13 years experience working with the veterinary profession. Member AVMLA and VetPartners™.
6. **Lutz, Bonnie, Esq.**, Klinedinst PA, 4 Hutton Center Dr., #675, Santa Ana, CA 92707, (714) 542-1800 Ext. 5210, blutz@klinedinstlaw.com, www.klinedinstlaw.com. Bonnie is an experienced VetPartners™ and AVMLA lawyer with extensive experience working on a multitude of animal law issues for humane associations and veterinary practices as well as veterinary legal defense issues in civil and state board cases.
7. **Chandler, Thomas, JD**, Hawley Troxell Ennis & Hawley, 877 Main St., Ste. 1000, Boise, ID 83701, (208) 304-6000, (208) 954-5209-fax, tchandler@hawleytroxell.com, www.hawleytroxell.com. Focus is on business and contract law, with extensive experience negotiating and drafting veterinary employment and compensation agreements as well as documents for the purchase and sale of veterinary practices and interests in veterinary practices, fair trade and restrictive covenants, and assistance with tax, business formation, and related business issues. Member AVMLA
8. **Dennis, Gregory M., Esq.**, Kent T. Perry & Co., LC, 7300 W. 110th St., Ste. 260, Overland Park, KS 66210-2387, (913) 498-1700, www.lawyers.com/perreulaw, tpeterson@ktplaw.com. Employment, personal injury, state board, buy-sell transactions, and business law. Member AVMLA
9. **Fleming, Duane, DVM, Esq.**, Contra Costa Animal Eye Clinic, 2100 Monument Blvd., Ste. 7, Pleasant Hill, CA 94523, (925) 827-2257. Employment contracts and state board representation. Member AVMLA
10. **Homsey, Phil, II, Esq.**, P.O. Box 291970, Los Angeles, CA 90029, (818) 547-0800, www.philhomsey.com, philphomseyesq@yahoo.com. Employment contracts and all types of buy/sell transactions, and corporation, partnership, LLC, and LLP documents. Member AVMLA and President, VetPartners™
11. **Guiducci, Ed, Esq.**, Guiducci & Guiducci, P.C., 14239 W. 69th Pl., Arvada, CO 80004, (303) 355-3463, www.guiduccilaw.com, ed@guiduccilaw.com. Member VetPartners

12. **Jack, Douglas C.**, 184 St. Andrew Street W., P.O. Box 192, Fergus, Ontario, Canada N1M 2W8, (519) 843-4908, www.dcjack.com, dcjack@dcjack.com. Has his own book about veterinary law specific for Canada. Member AVMLA
13. **Pena, Connie, JD, & Calhoun, Laura JD**, Albin Harrison Roach, Granite Park III, 5601 Granite Pkwy., Ste, 400, Plano, TX 75024, (214) 423-5100, ahrlawfirm.com. Employment contracts and general business law.
14. **Salzsieder, Karl R., DVM, JD**, Salzsieder Consulting & Legal Services, 1133 14th Ave., Longview, WA 98632, (360) 577-8115, www.vetbizlaw.com, karl@vetbizlaw.com. Handles veterinary employment contracts and appraisals, negotiations, for and legal documents for practice purchases and sales. Member AVMLA and VetPartners. Past President of both.
15. **Yasgoor, Stuart J., Esq.**, 7911 Herschel Ave., Ste. 310, La Jolla, CA 92037, (800) 457-2646, www.stuartyasgoor.com, leglbejl@stuartyasgoor.com. Lots of experience with documents for practice sales and purchases as well as employment and independent contractor contracts and some practice mergers. Member AVMLA
16. **Charles Curtis, Esq.**, 1486 S.W. 19th Ave., Ft. Lauderdale, FL 33312, (954) 763-1716, www.charlescurtispa.com. Has experience with veterinary state board legal defense work.
17. **Owens, John, Esq.**, P.O. Box 840136, St. Augustine, Florida 32080 (904) 599-2555. www.lawofficeofjohnowens.com. Has spoken a few times at U of Florida VBMA.

Relief Veterinary Services

1. **VetRelief.com**, 24701 La Plaza, Ste. 202, Dana Point, CA 92629, (949) 234-1960, www.vetrelief.com, smarthire@vetrelief.com.
2. **The Colorado Relief Doctor Registry**, 15847 Woodmeadow Ct., Colorado Springs, CO 80921, (719) 487-9973, www.vetbroker.com/relief_vets_co.htm, dave@vetbroker.com.
3. **Lighthouse Veterinary Personnel Services**, Terry Jones Forte, DVM, Eric Ratliff, CEO, (800) 888-6877, www.lighthousevet.com, terri@bindig.com. Relief veterinary services for OH, PA, MI, KY, IN, and WV.

Construction Supervision

1. **Spivak, Ross, LEED, GA**, RES Consulting NYC, Inc., 520 E. 72nd St., Ste. 10N, New York, NY 10021, (917) 208-0570, (917) 720-9101-Fax, www.resconsultingnyc.com, RossSpivak@resconsultingnyc.com. Mr. Spivak provides exceptional oversight and supervision of all veterinary new construction and remodeling activities, relieving practice owners and purchasers of practices with the risks and difficulties of hiring contractors who know little about veterinary facility build-outs. His assistance varies from overcoming zoning issues with noise abatements to choices of materials to reviewing bids for construction to providing on-site supervision of contractors.

Useful Web Sites

1. **American Animal Hospital Association**, www.aahanet.org, www.healthypet.com.
2. **American Demographics**, www.adage.com/americandemographics/. Demographic trends affecting veterinary hospitals and client bases.

3. **American Veterinary Medical Association**, www.avma.org. AVMA members pay \$250 per year for access to the AVMA's Network of Animal Health (NOAH), including discussion groups, data bases, the NOAH library, and NOAH Conferences.
4. **Federal Drug Administration**, 10903 New Hampshire Dr., Silver Spring, MD 20993, (888) 463-6332, www.fda.gov.
5. **Employment Opportunities**, www.wheretechnsconnect.com, www.careerbuilder.com, www.monster.com. Locating veterinary technicians, receptionists, office managers, etc.
6. **Gatto McFerson CPAs**, www.gattomcferson.com. Information and tidbits for veterinarians and their practices, changes in the tax law, recent news on computers and software, links to other interesting web sites.
7. **Internal Revenue Service**, www.irs.gov. Information on business and personal tax questions, as well as IRS documents and forms.
8. **Morris Animal Foundation**, 10200 E. Girard Ave., B430, Denver, CO 80231, (800) 243-2345, www.morrisanimalfoundation.org, mailbox@morrisanimalfoundation.org. Information on industry news, companion animals, and wildlife.
9. **NetVet Veterinary Resources**, Ken Boschert, DVM, Associate Director, Washington University Division of Comparative Medicine, Box 8061, 660 S. Euclid Ave., St. Louis, MO 63110, <http://netvet.wustl.edu>. Numerous links to medical and animal sites.
10. **Occupational Safety & Health Administration**, 200 Constitution Ave. N.W., Washington, DC 20210, www.osha.gov. Up-to-date information on OSHA regulations, as well as information on receiving a free OSHA.
11. **U.S. Small Business Administration**, (800) 827-5722, www.sbaonline.sba.gov, answerdesk@sba.gov. Information on financing a small business and the answers to frequently asked business start-up questions.
12. **United States Department of Agriculture – Animal Welfare Info Center**, National Agriculture Library, 10301 Baltimore Ave., Room 410, Baltimore, MD 20705, (301) 504-6212, http://awic.nal.usda.gov/nal_display/index.php?tax_level=1&info_center=3, awic@nal.usda.gov.
13. **Advanstar Veterinary Healthcare Communications**, www.dvm360.com. Information on Advanstar products such as conferences, *Veterinary Pharmaceuticals and Biologicals*, veterinary journals, and jobs available.
14. **Veterinary Information Network**, 777 W. Covell Blvd., Davis, CA 95616, (800) 700-4636, www.vin.com, vingram@vin.com. For an annual fee of \$680, VIN offers a Medical Message Board, a Veterinary Journal Library, a Rounds Room, CE Courses, and a Pet Forum.
15. **Veterinary Pet Insurance**, P.O. Box 2344, Brea, CA 92822-2344, (888) 899-4VPI, www.petinsurance.com.
16. **Diversified Medical Service, Inc.**, 6062 Arlington Blvd., Falls Church, VA 22044, (703) 536-8510, www.dmedservice.com, info@dmedservice.com.

New and Used Equipment and Instruments Sources and Websites

Nothing is known about the reliability or reputation of any used equipment dealers so this is a “buyer beware” list of resources regarding used equipment. Also, check with the purchasing departments of local human hospitals. Many times they are willing to sell older, yet very functional equipment.

1. **MedMatrix**, 178 S. Monterey Isle Blvd., Longwood, FL 32779, (407) 772-3427, www.medmatrix.com, torbes@ix.netcom.com.
2. **MedMart**, 178 S. Monterey Isle Blvd., Longwood, FL 32779, (407) 772-3427, www.medmart.com, torbes@ix.netcom.com.
3. **Classic Universal Ultrasound**, 19900 Mona Rd., Ste. 105, Tequesta, FL 33469, (800) 722-6838, www.classicmedical.com, info@classicmed.com. Ultrasound equipment.
4. **Alfa Medical**, 265 Post Ave., Westbury, NY 11590, (800) 801-9934, www.sterilizers.com, email@sterilizers.com. Alfa Medical has been used by many to purchase autoclaves. The best manufacturer is Pelton Crane and the best models are OCM or OCR.
5. **MD Publishing**, 18 Eastbrook Bend, Peachtree City, GA 30269, (800) 906-3373, www.mdpublishing.com, info@mdpublishing.com.
6. **Paragon Medical Supply**, P.O. Box 770187, Coral Springs, FL 33077, (800) 780-5266, www.paragonmed.com, sales@paragonmed.com.
7. **Professional Medical Standards & Sales, Inc.**, 520 N. Parramore Ave., Orlando, FL 32801, (888) 838-7883, www.vetstuff.com, rex@vetstuff.com.
8. **DRE, Inc.**, 1800 Williamson Ct., Louisville, KY 40223, (800) 979-6795, www.dreveterinary.com.
9. **AFP Imaging Corporation**, 250 Clearbrook Rd., Elmsford, NY 10523, (800) 592-6666, www.afpimaging.com, custserv@afpimaging.com.
10. **DOTmed**, www.dotmed.com, info@dotmed.com.
11. **Diversified Medical Service, Inc.**, 6062 Arlington Blvd., Falls Church, VA 22044, (703) 536-8510, www.dmedservice.com, info@dmedservice.com.
12. **Grady Medical Systems, Inc.**, P.O. Box 2396, Temecula, CA 92593, (800) 800-2585, http://www.gradymedical.com/index.php?option=com_content&view=article&id=49&Itemid=55, grady.medical1@verizon.net.
13. **Universal Medical Systems, Inc.**, 29500 Aurora Rd., Unit 16, Solon, OH 44139, (440) 349-3210, www.veterinary-imaging.com. They are the largest suppliers and servicers of CT's and MRI's to the veterinary community.
14. **Surgical Direct, Inc.**, Kevin Francis, (636) 527-3383, www.surgicaldirectinc.com, kevin@surgicaldirectinc.com.

Commercial Lenders for Purchases of Veterinary Practices

Many of the following lenders, except for local banks, are what are known as “cash flow” lenders. They often lend 100% of the purchase price plus working capital on purchases, start-ups, and expansions of veterinary practices, even if borrowers have significant educational debt. Some of these lend only into the veterinary and/or dental segments of the health care markets.

Some also provide loans for real estate and within all of them you will find niches into which some lend and others don't, depending on their experience in veterinary medicine. For example, most will not lend on ambulatory practices, except for equine ambulatory. Some are good at construction loans, others shy away. Some offer real estate loans and others do not. Some are direct lenders, holding the "paper" themselves and others help you acquire loans through the Small Business Administration.

1. **Banc of America Practice Solutions – a Division of Bank of America**, Ian Widensky, Northeast Regional Sales Manager – Veterinary Division, Bank of America Practice Solutions, (888) 600-9612, www.bankofamerica.com/practicesolutions, ian.widensky@bankofamerica.com. Perhaps the most rapidly growing lender in the veterinary practice arena expanding from general small animal start-ups and purchases into emergency and specialty practice start-ups and purchases. Has an excellent presentation for VBMA chapters covering credit reports and scores for individuals and what cash flow is for a practice. B of A Practice Solutions is the only veterinary lender endorsed through an alliance with the AVMA which provides **reduced loan administration fees** for AVMA members. (see http://www.avma.org/about_avma/benefits/boa.asp). Ian is a VetPartners member and founder of the Veterinary Resource Alliance based out of New York, Connecticut and New Jersey. **See the entire group of experts who provide advice and counsel for veterinary practice start-ups, purchases and expansions at www.thevetalliance.com.**
2. **Live Oak Bank**, Jim and Chip Mahan, Travis York, Brian Falk and JP Blevins et al 2605 Iron Gate Dr., Ste. 100, Wilmington, NC 28412, (910) 790-5867, www.liveoakbank.com, jim.mahan@liveoakbank.com. This company's founders each have over 20 years of experience in providing innovative and cost-effective financing for business owners within the veterinary industry. Especially valuable when it comes to SBA loans. VetPartners member and **huge supporter of the National VBMA!**
3. **Matsco**, 2000 Powell St., 4th Floor, Emeryville, CA 94608, (800) 326-0376, www.matsco.com, info@matsco.com, Jim Baum, Mid-Atlantic Regional Manager, (800) 897-2208, jim.baum@matsco.com, Judy Jennings, Midwest Regional Manager, (800) 540-0802, judy.jennings@matsco.com. Matsco offers a free audio CD, *Building Blocks for Success: Constructing Your Ideal Veterinary Hospital* at <https://www.matsco.com/veterinarians/practice-resources/business-planning-tools.php#building-blocks>, endorsed by AAHA. Lending \$200 million as of 2005 for veterinary practice acquisitions, start-ups, and expansions nationwide at usually prime plus 1-1.5%. Two additional excellent business planning tools, New Veterinarian Planner and Project Planner. VetPartners members
4. **Vine Street Financial, A Division of BB&T**, Vince Dailey, 5901-C Peachtree Dunwoody Rd. Suite 420, Atlanta GA 30328, (800) 758-0038, www.vstfinancial.com or www.bbandt.com, ssdunn@bbandt.com.
5. **PNC Bank**, Gregory Schultz, (215) 517-6266, (800) 762-5684, <https://www.pnc.com/webapp/sec/ProductsAndService.do?siteArea=/PNC/Home/Small+Business/Business+Loans+and+Credit/Business+Loans+and+Credit>, gregory.schultz@pnc.com. Greg has made multiple veterinary practice purchase loans including one for an equine practice in Bucks County, PA in 2006.
6. **Midwest Bankers Commercial Lending Services**, 9000 Keystone Crossing, Ste. 630, Indianapolis, IN 46240, (800) 341-2084, www.midwestbankers.com. Veterinary lending for the Midwest and West Coast.
7. **ProMed Financial, Inc.**, 14742 Newport Ave., Ste. 209, Tustin, CA 92780, (888) 277-6633, www.promed-financial.com, info@promed-financial.com.
8. **Coffman Capital, Inc.**, 108 S. Bayview Blvd., Oldsmar, FL 34677, (813) 891-1811 Ext. 103, www.coffmancapital.com.

9. **U.S. Small Business Administration**, (800) 827-5722, www.sbaonline.sba.gov, answerdesk@sba.gov. Great source of free information on business start-ups.
10. **United Western Bank**, 700 17th St., Ste. 1000, Denver, CO 80202, (800) 594-2079, www.uwbank.com, bankonline@uwbank.com.
11. **CIT Small Business Lending**, (800) 713-4984, www.smallbizlending.com, sbaloans@cit.com.
12. **Professional Practice Capital**, Brannon Moncrief, Director of Business Development, 9303 New Trails Dr., Ste. 375, The Woodlands, TX 77381, (800) 456-2779, (832) 724-5700-cell, www.ppcloan.com, brannon@ppcloan.com.
13. **SBB Practice Sales**, Dr. Kurt D. Liljeberg, 31213 Manchester Ln., Bay Village, OH 44140, (800) 380-6872, (440) 670-6777-cell, www.sbbsales.com, kurt@sbbsales.com. A division of the Veterinary Practice Sales Group that services NY, OH, PA, and WV.