

***Certified Medical Planner Program ©***

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**Welcome - Future CMP© Charter Holder**

As a financial professional, you realize physicians in private practice need fundamental business skills. The ability to deliver profitable and quality-driven business and financial advice depends on your ability to acquire these skills. This means learning basic managed care principles and tools, and developing the financial vocabulary required to communicate effectively with administrators, physicians, or clients. More importantly, it involves the integration of personal financial planning, with contemporaneous medical management principles.

Responding to a growing demand from both physicians and financial professionals, MBA, Inc, began sponsoring a professional certification program leading to the charter-designation of: Certified Medical Planner©. The CMP© charter has since broadened the healthcare business skills of both financial advisors and medical professionals from a variety of specialties, including:

- Financial planners and advisors, CPAs, RIA, CFPs, CFAs, attorneys, RHUs, insurance agents, RRs, IT, healthcare administrators and consultants

Our graduate-level CMP<sup>®</sup> program provides a broad overview of the key concepts and best practices every financial professional needs to know in order to positively contribute to any medical organization's success, or add real value to a physician-client relationship. Depending on your financial advisory needs, we offer a core and elective program, which is customized for your current and ever-changing business model.

To earn your CMP<sup>®</sup> certification from the Institute of Medical Business Advisors, 24 on-line classes in four semesters, and totaling 500 hours of matriculation must be completed within 12 months. Alternatively, an MBA Certificate of Completion Diploma<sup>®</sup> will be awarded for participation in month-long individual courses. CMP<sup>®</sup> charter holders, and independent MBA affiliate advisors, will then be placed in our private MBA-Trust<sup>®</sup> referral exchange program to receive clients leads, speaking invitations, publication assignments, media interviews or otherwise interact with our community of like-minded physicians and financial professionals.

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### **Tuition and Fees**

Some of the courses included in the CMP<sup>®</sup> program are listed below, but are constantly changing because of marketplace fluctuations. If you are interested in a course that is not listed, please let us know and we will work with our faculty to develop and facilitate a topic module that is of particular interest to you (i.e., boutique medicine, medical practice valuation techniques, etc.).

Tuition is only \$5,999 for the entire on-line CMP<sup>®</sup> curriculum. Alternatively, it is \$499 per individual Diploma course, if taken under the more focused MBA Certificate of Completion<sup>®</sup> format. Modest textbooks fees are extra, and there is a non-refundable application fee of \$250. Rest assured however, our fraternal asynchronous teaching methodology is both androgenic and hetuagoc in nature, and collegial in presentation. And, our program is nationally based and available 24/7, for all financial professionals, regardless of degree, specialty designation or certification.

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### **CMP<sup>®</sup> Current Curriculum**

In the Certified Medical Planner<sup>®</sup> certification program from MBA, Inc, you will learn how to create an environment for strategic healthcare administration thinking that links this process to the operational decisions that support the long-term direction of any medical practice, or for the physician clients your advise. You will learn:

- The difference between a useful mission, vision, and values statement, and one that just sounds good.
- Tools to construct the strategic architecture of a medical or healthcare practice

- How to develop a strategic thinking document or Investment Policy Statement (IPS)
  - What you, as a leader of a medical advisory practice, must do to affect change within your organization.
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## **Effective Medical Marketing and Advertising Management**

How does a medical practice promote itself to patients? How do you position your financial advisory practice to attract the physician-clients you want? You will learn:

- Marketing and CRM assumptions for patients, health care leaders and financial advisors.
  - How marketing is so much more than advertising channels or sales.
  - How to identify your competency values, and why knowing. They are essential to your practice.
  - How to write a business or marketing plan and to promote your medical-financial advisory practice.
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## **Federal Compliance Impacting Private Medical Practices**

Grasp the opportunity to discuss the issues that challenge both doctors and advisors, with experts who can help you negotiate the compliance maze. You will learn:

- How compliance rules, and the exceptions to those rules, apply to particular hospital and office practices
- Strategies for working within rules for, among others:
  - Medical insurance, liability and malpractice issues
  - Medicare compliance principles
  - OSHA, EPA, DEA, peer review, workplace violence and gender discrimination risks
  - Risk management principles for physicians and healthcare organizations
  - Physician Self-Referral (STARK) risks
  - Advanced Beneficiary Notices (BANs) and HIPPA Privacy and Security

You're encouraged to submit questions and topics for discussion prior to all class sessions.

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## **Financial Management and Healthcare Economics**

Several classes are also devoted to helping you better understand the financial aspects and economics of medical practice. You won't leave your CPA partner, or become one, but you will be able to talk more intelligently with medical managerial accountants and make better management decisions.

In turn, as a financial professional, you will discern better ways to serve your physician clients, in today's complex healthcare industrial complex. You will learn:

- To differentiate between financial account and managerial accounting information ... and why that's important
- To use both financial and managerial accounting to facilitate managerial decision-making in a medical practice
- To conduct a ratio analysis of financial accounting statements to understand practice strengths and challenges
- Conduct time-value monetary analysis, to make capital acquisition, buy/lease, and borrowing decisions
- Learn the basics of cost accounting, cost behavior, and activity based costing in medicine (ABCM)
- Apply cost-volume-profit analysis, and CPT coding, to medical pricing and service decisions
- Understand the effects of Medicare and managed care reimbursement on cash flow and medical practice financial position.

A little bit of online lecture. A little bit of reading ... A lot of practice on real case studies.... Bring a calculator for TVM calculations!

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### **Medical Quality Service Delivery**

Facilitated by experts in health care “patient” services, this session will help you spot new ideas for delivering exceptional patient service that goes beyond Demming / Juran basics. You will learn:

- A wealth of ideas from successful medial practices across the country to make patients loyal fans
  - Proven practical tools to improve communication and productivity in a medical office
  - How to create an action plan for growth and development of your health care team and financial advisor.
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### **Recruiting, Retaining, and Managing High Healthcare Administrative Performers**

There are strategies and tools you can use to recruit, hire, retain, and manage a staff of highly motivated talented employees. These two sessions provide an opportunity to evaluate your current processes and learn practical ways to improve. You will learn:

- Strategies for hiring the right people through HR planning and a recruitment effort based on “optimal fit”.
- Behavior-based interviewing techniques to reliably select and assess staff based on their performance.
- How to manage retention by establishing a reciprocal employment “contract”.

- Develop a systematic performance management process that is fair, motivating, and focused on excellence.
  - PEO outsourcing for reduced human resources liability and added profit, for both doctors and advisors.
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## **Managing Profitable Healthcare Operations**

Work smarter, not harder, to save your medical practice or physician-clients money, and make them never even consider leaving your trusted relationship. You will reduce client / patient churn, by learning:

- How operational efficiencies can significantly affect your bottom line.
  - Practical tools and techniques you can use to improve:
    - Patient flow and scheduling
    - Quality management
    - Inventory and DME management
    - Work system design to reduce redundancies and bottlenecks
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## **Information Systems Management**

Digitally integrated clinical medical records provide substantial benefits to private practices, including workflow efficiencies, improved access to patient's clinical information, decision support, outcomes measurement, and increased patient and provider satisfaction. Current healthcare trends affecting private practices that would benefit from a digital medical record:

- Software, hardware, IT, and medical management ASP selection and use for EMRs and COPEs.
  - Current IT trends for private practices in hardware, networking, interfaces, and software.
  - Key benefits realized by private practices through implementation of a digital medical record process.
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## **Personal Financial Planning for Physicians and their Financial Advisors**

The entire financial planning continuum is also addressed in this comprehensive curriculum for physicians and their financial advisors. In it, you will learn about:

- General monetary principles and healthcare economics
- Investment planning with debt, equity, mutual funds, ETFs, market-neutral hedge funds, and other derivatives
- Portfolio management and construction

- Medical practice and personal risk management and insurance
  - Accounting and income tax planning
  - Business succession planning for medical practices
  - New doctor recruitment
  - Managed care contract negotiation skills
  - Asset Protection planning for doctors
  - Medical practice appraisals for sales or dissolution
  - Special situations planning for physicians
  - How to select, and become one of the best financial professionals and business advisors?
  - Retirement and estate planning.
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**And ... so much more vital information!**

Many consider the CMP<sup>®</sup> curriculum the functional equivalent of a combined MBA degree / financial planning diploma, but focused on the unique wants and needs of today's time-constrained physicians, and the financial advisors that assist them.

No wonder! It was designed by dual degreed physician-advisors, physician-attorneys, physician-accountants, psychologists, healthcare consultants and nurse-executives! And so, you will also learn about:

- Ripple effects of managed medical care in the USA
  - Status of physician unions and the financial services industry
  - How to set up a modern medical practice
  - Ethical medical records and billing practices
  - Diagnostic Related Groups (DRGs)
  - Medical business equipment and information systems
  - Managed care reimbursement and negotiation strategies
  - Fixed rate HMO or MCO re-imburement models
  - Ambulatory Payment Classifications (APCs) and Ambulatory Care Centers (ACCs)
  - Medical practice sales and contracting issues
  - Self, or advisory-driven, portfolio management
  - Physician divorce planning, change and crisis management
  - Physician personal re-engineering and re-education
  - Behavioral economics, psychology and personal financial planning
  - Complete with .pdf, MS-WORD, MS-PPT files and templates you can modify for your own use.
  - And so much more ....
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## **CMP<sup>®</sup> Accreditation ... the Marks of Distinction**

The proprietary CMP<sup>®</sup> designation, and on-line academic certification program, is domestically owned and copy-written by the Institute of Medical Business Advisors, Inc.

The Institute's code of conduct is verified by HONcode<sup>®</sup> and Geneva University Hospital, the international medical website surveyor based in Switzerland.



Additionally, we are recognized as a practice management resource by the Journal of Financial Planning (JFP), the official publication of the Financial Planning Association (FPA), for those advisors licensed or operating under its auspices. Thus, CMP<sup>®</sup> certification is the academic mark of distinction in the conjoined healthcare business and financial consulting space.

And so, whether you are an accountant, lawyer, healthcare administrator, insurance agent, physician colleague or financial professional, you are cordially invited to contact a CMP<sup>®</sup> Curriculum Councilor at your earliest convenience. You have our pledge that we will help you develop the optimal curriculum for your financial consulting firm ... *iMBA: for doctors, for advisors, for you!*

**Fraternally,**

*David Edward Marcinko*

**David Edward Marcinko**  
Certified Medical Planner<sup>®</sup>

### **Contact:**

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