



# Senior Care and Living Practice

Plante Moran is among the nation's largest certified public accounting and business advisory firms.

## Firm at a glance

1924 year founded	50 states	25 offices in the United States and abroad	120+ countries with clients	3,100+ professionals	20,000+ clients
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## Your full-service approach

Our audit, tax, and consulting professionals have a deep understanding of the risks, trends, and growth strategies impacting senior care and living providers today. Our clients benefit from our experience serving organizations of all sizes and structures all across the health care continuum.

60+ years of experience in the healthcare industry as a firm		AUDIT		TAX
200+ trained professional staff who specialize in healthcare				
26 average years of healthcare industry experience per partner		CONSULTING		DEVELOPMENT
1,200+ senior care and living providers across the continuum				

## Nationally recognized leaders

Our team of nationally recognized thought leaders are committed to staying ahead of the curve. Our experts are regular contributing authors at national publications such as Market Watch, McKnights, Becker's Hospital CFO, Becker's Hospital Review, Senior Housing News, and STAT News.

We are also sought-after presenters at numerous national and state healthcare industry associations and conferences, including:

- American Health Care Association (AHCA) & numerous state chapters
- LeadingAge National & numerous state chapters
- National Investment Center for the Senior Housing & Care Industry Conference (NIC)
- Healthcare Financial Management Association (HFMA) — national sponsor, numerous state chapters, Strategic CFO Council
- National Association for Home Care & Hospice (NAHC)
- Lincoln Healthcare Leadership Events
- American Health Lawyers Association (AHLA)
- Argentum
- American Seniors Housing Association (ASHA)

Our greatest asset is our people — not just their knowledge, but their integrity and commitment to our clients, staff, and communities. When you partner with us, our world-class industry experts and thought leaders will help you develop innovative strategies and execute with operational excellence. We will share our extensive array of data and research giving you access to unparalleled industry information and insights.

- ❓ *Is your strategic plan innovative and reflective of industry trends including consumer preferences, technology's impact on senior living, and the significant potential for growth?*
- ❓ *Do you have a plan to address declines in skilled nursing occupancy, increasing resident and patient acuity, and a shift to value-based payments? And, do you have a clear value proposition for your stakeholders?*
- ❓ *Does the size and scale of your organization provide the operational efficiency needed to compete?*
- ❓ *Is your senior housing facility positioned to withstand the oversupply of units created by the recent construction boom?*
- ❓ *Have you considered positioning your senior housing facility to collaborate with health networks, managed care organizations, and the shift to a combined medical and social model of care?*

Every senior care and living organization faces unique challenges related to capital planning. Plante Moran Living Forward is a uniquely qualified expert called upon to answer tough development and feasibility questions. We provide unrivaled, unbiased advocacy and support to senior living operators, owners, and developers from concept to completion.

- ❓ *Have you assembled the best development team of owner's representatives, architects, and construction managers for the project?*
- ❓ *Do you have a development consultant, with senior living experience, helping you keep the project on budget and on schedule?*
- ❓ *Does this investment make economic sense for your community?*
- ❓ *How can you strategically reposition your assets to meet market demand and expectations?*

## Key capabilities

Our audit, tax, and consulting experts can help you focus your organizational efforts to streamline processes, reposition services, evaluate partnerships, and consistently reduce costs and improve outcomes to reach your long-term goals.



## Value delivered

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**“ Our expectations for first-year financial audit and cost reports were more than exceeded. The team was exceptionally prepared with detailed schedules and great communication.**

Their healthcare experience was invaluable, and because they were so efficient and knowledgeable, we finished one week ahead of schedule. We chose Plante Moran because of their entrenchment in the Chicago area, and we were looking for a strategic partner that could provide us additional services and expertise to help us reach our future goals. I feel confident in our future with Plante Moran as our partners.”

— **Lori Altman, CFO**  
Central Baptist Village

**“ All of the team members at Plante Moran are very knowledgeable in the LTC reimbursement arena and always very professional and pleasant to work with.**

They have been invaluable over the past eight years! Each year after completing the Medicare & Medicaid cost report, Plante Moran provides us with information on how Trilogy ranks with other providers of LTC services and recommendations on areas of improvement. This has been instrumental to improvements in our documentation of resident care, which has led to improvements in our overall reimbursement.”

— **Carrie L. VanCuren**  
Assistant Vice President, Budgeting & Reimbursement  
Trilogy Health Services

**“ Plante Moran Living Forward did a great job, from helping us figure out what we could afford to build to providing forecasted financial statements through the first full year of stabilization...**

to selecting an investment banker and managing design and construction. [They] guided us through the entire process and did a super job. I'd give them an 'A' and hire them again in a heartbeat.”

— **Mike Allen**  
Vice President of Finance and Facilities  
Graceworks Lutheran Services

# Meet the Plante Moran senior care & living practice team



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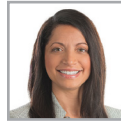
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● Audit

○ Tax

● Development Consulting

○ Reimbursement & Payment Advisory

● Strategic Planning

○ Transaction Advisory Services

● Operational Improvement

● Revenue Cycle Management