

# TEAM SPOTLIGHT

## Veterinarian Team of 3



### Abby Fredrick, Client Service Manager

*I love working with veterinarians because it allows me a behind the scenes view of a veterinary clinic. All of our veterinarians are extremely sweet, organized, and have great communication skills.*

The Client Service Manager (CSM) focuses on accounting, payroll, sales tax, and all things QuickBooks Online (QBO). The CSM accepts and codes business bank and credit card transactions and reconciles all accounts to optimize financial and tax position. She also processes payroll, facilitates payroll changes, prepares and files sales tax, and answers all questions related to monthly accounting and QBO.

### Abby's Favorites

- ◆ **Favorite business book:**  
The 80/20 Principle
- ◆ **Favorite animal:**  
All of them! I can't choose.
- ◆ **Favorite business tip:**  
Patience, enthusiasm and surrounding yourself with a good team are crucial to creating a successful business.



### Holly Carr, Client Controller

*I love working with veterinarians because they have enormous empathy for animals and their owners. They have excellent communication skills and the ability to adapt to unpredictable situations in their practice.*

The Client Controller explains monthly financial statements and tax strategy. The Client Controller prepares monthly management use financial statements with voice over commentary offering suggestions to changes in revenue or expenses, prepares the annual tax returns and bi-annual tax projections. She answers all tax savings questions and presents tax liability due and the opportunities to reduce it BEFORE the year ends.

### Holly's Favorites

- ◆ **Favorite business book:**  
7 Habits of Highly Effective People
- ◆ **Favorite animal:**  
Horses
- ◆ **Favorite business tip:**  
Discipline leads to habits.  
Habits lead to consistency.  
Consistency leads to growth.



### Lezlie Reeves, CPA, Client CFO

*I love working with veterinarians because of their big hearts. They are always looking for ways to care for more animals and reward their hard working teams.*

The Client CFO will be your main point of contact for general business strategy as well as tax strategy. The Client CFO tracks and offers opportunities to improve KPIs such as revenue, profit, labor costs, and costs of services, as well as, ideas for increasing number of new patients, patient retention, and patient revisits or patient bonding rate.

### Lezlie's Favorites

- ◆ **Favorite business book:**  
Atomic Habits
- ◆ **Favorite animal:**  
Small fluffy dogs
- ◆ **Favorite business tip:**  
Clarify your values and your goals so you aren't distracted by every new opportunity that comes your way.

At Dillon Business Advisors, we work with owners just like you. Let's schedule a call to build the business you envision.