

TEAM SPOTLIGHT

Dental Team of 3



Amada Santos, Client Service Manager

I love working with dentists because they help people feel better about their smiles. We need more people smiling in the world!

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.

Amada's Favorites

- ◆ **Favorite business book:**
Atomic Habits
- ◆ **Do you floss daily?**
Yes!
- ◆ **Favorite business tip:**
A recipe for business success is organization and planning. This allows for timely completion of important tasks.



Elena Munoz, EA, Client Controller

The best part of working with dentists is getting to know the person behind the white coat and the team that helps run their practice. Lending an ear to a new idea is highly valued by our dental clients.

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.

Elena's Favorites

- ◆ **Favorite business book:**
Traction
- ◆ **Do you floss daily?**
Every other day!
- ◆ **Favorite business tip:**
Always make a plan, but be flexible.



Marcus Dillon, CPA, Client CFO

The best part of working with dentists is the relationships we get to build with the owner, team, and owner's family. I love to celebrate the good, work through challenges, and help them live the life they want.

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.

Marcus's Favorites

- ◆ **Favorite business book:**
Start with Why
- ◆ **Do you floss daily?**
Clarify daily?!?! ...and No.
- ◆ **Favorite business tip:**
No amount of success at work makes up for failure at home.

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