

TEAM SPOTLIGHT

Dermatology Team of 3



Lindsay Travis, Client Service Manager

The best part of working with dermatologists is how much they have going on behind the scenes. I love seeing the ins and outs of their growing business.

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.

Lindsay's Favorites

◆ **Favorite business book:**

Atomic habits

◆ **Do you wear sunscreen daily?**

Facial sunscreen

◆ **Favorite business tip:**

My current favorite is to always remember your "why."



Katie Krug, CPA, Client Controller

I love working with dermatologists because they help their patients feel confident in their skin.

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.

Katie's Favorites

◆ **Favorite business book:**

Taxes, Assets & Heirs: Personal Wealth Management for Business Owners

◆ **Do you wear sunscreen daily?**

Yes! Facial sunscreen daily

◆ **Favorite business tip:**

Build a strong team and support network.



Lezlie Reeves, CPA, Client CFO

The best part of working with dermatologists is that dermatology has the ability to lean into elective procedures to boost their performance.

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

◆ **Do you wear sunscreen daily?**

Face sunscreen daily. I wish I had started earlier.

◆ **Favorite business tip:**

Clarify your values and your goals, so you aren't distracted by every new opportunity.

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