2024 IVMA Practice Management Seminar
Healthy Paws, Healthy Practice: A Clinic Check-Up
Presented by: Fritz Wood and Geoff Huber, CFP

Topics & Descriptions

Keys to Practice Health (Wood)
This session will dissect the veterinary business model and share secrets of high-performing practices. Life is easier when you focus on the precious few things that matter most and take your foot off the brake!

Laboratory Best Practices (Wood)
The lab has been, is, and will continue to be the fastest growth profit center in small animal practice. Today, the focus is on preventive screens for apparently healthy pets. Pricing preventive panels differently help ensure success. Preanesthetic screens, senior care, and long-term med monitoring will also be discussed.

Pharmacy Best Practices (Wood)
Competition is fierce, but you can compete and win! Giving pet owners what they want – including a competitive price – will give you the edge.

Smart Inventory Management (Wood)
Why is inventory management and control important? Does it really matter? How do we improve? What are the goals of inventory management and control? Are product sales still worth worrying about?

Roadmap to Personal Financial Success (Huber)
Learn the fundamentals of personal financial success and avoid common mistakes. This section will also include what to look for in a professional advisor and what to avoid.

The ABCs of Small Business Retirement Plans (Huber)
With today's tough labor market, having the right employee benefits helps attract and retain key employees. It's also a shame to overpay your income taxes each year! Learn the fundamentals of different options and get your questions answered in this interactive session.

Agenda

8:30-9:00 am	Check-in
9:00-10:00 am	Keys to Practice Health
10:00-10:50 am	Laboratory Best Practices
10:50 – 11:00 am	Break
11:00 – Noon	Pharmacy Best Practices
Noon – 1:00 pm	Lunch

1:00 – 2:00 pm	Smart Inventory Management
2:00 – 2:50 pm	Roadmap to Personal Financial Success
2:50 - 3:00 pm	Break
3:00 – 4:00 pm	The ABC's of Small Business Retirement Plans

Meet Your Presenters

Fritz Wood

Fritz operates H. F. Wood Consulting, an animal health consulting practice in Kansas City. He's focused exclusively on the veterinary profession for nearly 30 years, conducting important research on veterinary productivity and attributes of high-performing practices. Fritz is also affiliated with Triune Financial Partners (www.triunefp.com), a comprehensive personal financial planning and investment management firm. Both practices exist to help veterinarians achieve their lifetime goals.

Fritz was the Personal Finance Editor of Veterinary Economics, where he also served on the Editorial Advisory Board. He was on the Editorial Advisory Board of Veterinary Team Brief, and contributed to Veterinary Advantage. He's authored many dozens of articles related to the business of veterinary medicine and personal finance. Fritz is a frequent presenter at local, state, regional, national and international veterinary meetings, and a few colleges of veterinary medicine.

He was Treasurer and served on the Board of Directors of the American Veterinary Medical Foundation (AVMF). He served on the Pricing Subcommittee of the National Commission on Veterinary Economic Issues (NCVEI), and is a Founding Member of VetPartners. He served as the Practice Management Chairman of the North American Veterinary Conference (now VMX), and on the Fear Free Executive Council. Currently, he sits on the Advisory Board of Today's Veterinary Business.

Fritz holds a Bachelor of Science in Business (Accounting and Business Administration) from the University of Kansas (1986). For decades, he was licensed as a Certified Public Accountant and Certified Financial Planner. Fritz's pre-vet experience included 9 years as a management consultant with a top global consultancy.

Geoff Huber, CFP®, CKA®, ChFC®, CLU®

Partner, Retirement Plans, Triune Financial Life Planning

Geoff leads Triune Financial Life Planning Retirement Plans practice. He shows clients that 401(k) Plans, Profit Sharing & Cash Balance Plans don't have to be expensive, cumbersome, nor complicated.

He's been in the financial industry for three decades, focused solely on retirement plans for over 20 years. Geoff's team serves high-performing veterinary hospitals across America.

After earning his B.S in Economics & Finance from SMU in Dallas, Geoff pursued several additional financial degrees. He & wife Stefani are blessed by 3 sons, 2 daughters-in-law, 2 dogs & 3 grand-dogs!

Geoff enjoys being in, on or near the water, traveling with Stefani, rooting for KC's Royals & Chiefs – and craft beer. He & Stefani are passionate about Global Orphan Project, Value Unconditional, Advice & Aid Pregnancy Centers, and Character That Counts.