



Acquios<sup>®</sup>  
ADVISORS

Overview of  
Services

## WHO WE ARE:

The Acquios Advisors Team is proud of our 100+ years of experience working in and assisting Private Practices. Prior to becoming Advisors for offices, each of our Advisors worked in private offices in various roles. We have experienced the challenges you face, and we have developed solutions to guide you to be successful. *We've been in your shoes.*

Our Advisors have been trusted to walk alongside over 1,100 offices. We assist in improving the bottom line, the quality your culture, and so much more. We know there are no 'cookie cutter' solutions for any office, each office has its own unique needs and goals. Our mission states, **"We listen with compassion and collaboratively work to develop and implement a plan to help you and your team. We deliver Insight that Inspires."**

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## OUR TEAM:

### Owners and Advisors

#### Rick Guinotte, CEO and Advisor

Rick has worked with doctors in all aspects of their professional career, from opening their first locations who have gone on to quickly exceed revenue expectations. He has helped clients relocate, add associates, and develop exit strategies. He also gives presentations throughout the United States, Canada and beyond, sharing his insight and inspiring others.

Rick worked in the optometric field since 1989 – as a technician, optician, receptionist, manager, and as the territory director for 18 practice locations, \$13.5 million in revenue and 120 employees.

In 2009, Rick left his position with one of the world's leading frame manufacturers to become an advisor. Since then, he has worked with offices seeking growth and improved efficiencies, and he has helped people improve their team atmosphere, put systems in place to increase cash flow, and set goals for their practice locations. He is focused on helping his clients understand how to achieve and exceed the goals they have set.

Rick and his wife Debbie, have three children, Patrick has graduated with his JD/MBA degrees and is married, Meghan is in Optometry School, and Mackenzie is a student at UNO. He enjoys running and long walks.

#### Kirk Kastens, Vice President and Advisor

Kirk has worked in the optical industry since 1998, holding positions in private care practice as an office coordinator, and then as an advisor to private optometric practices.

Kirk has been advising offices since 2005, working with more than 500 practices in the United States and Canada. Kirk shares his expertise in Human Resources, Marketing, Operations and Financial Management with private care practice owners and paraoptometric, in multi-practice training sessions, and through phone consultations. Kirk also travels throughout the United States and Canada for various speaking engagements, where he shares his knowledge with Optometrists and their teams.

In his advising role, Kirk covers the broad spectrum of practice development, from putting together a business plan that fits a doctor's goals to helping a staff member improve his or her ability to educate patients. His passion for the industry continues to grow as he works closely with practice owners and members of their team to establish key processes critical to long-term success.

Kirk and his wife Cindy have three children, Olivia, Katherine, and Jack. He enjoys watching their activities and family time. In his spare time, he enjoys golfing, running, and being outdoors.

### **Tim Merrigan, Vice President and Advisor**

Tim has worked in the optical industry since 1992. He has held various positions in both the corporate and private sectors of the optical industry. He has been responsible for managing as many as 29 offices, and he has overseen the development and implementation of a variety of operational processes and procedures.

In 2013, Tim left a private practice to become a consultant to help private practice optometrists. He has worked with more than 100 offices in the United States and Canada. Tim's areas of expertise include human resource management, staff training and development, employee retention, accounting and budgeting, and adjusting cost of goods levels.

Tim has helped practices achieve success through financial controls, setting goals along with expectations and working with doctors on how to train and develop their team to meet those goals. "Everyone wants to be successful, we just sometimes need direction on how to get there," Tim explains.

Before getting into the Optical Industry, Tim spent three and a half years refereeing for the Harlem Globetrotters. He has called a basketball game in over 70 countries and all 50 states. He says the jump from officiating to optical was a no brainer because everyone knows that referees have great eyesight. "I have never missed a call, just ask me!" says the former referee.

Tim is the proud father of two beautiful daughters, Kaylee and Madison while also being a proud grandpa to Brady. In his spare time, Tim still enjoys officiating and trying to lower his golf score without using an eraser.

### **Kristina Lozano, Advisor**

Kristina comes to Acquios Advisors with more than 15 years of management experience. Most recently she worked as a multi-unit manager, responsible for eight locations, and for the success of 60+ team members. Kristina has an eye for finding top talent and has worked on recruiting for up to 30 locations.

Kristina thrives in the areas of Human Resources and Optical Management. Her experience leading, and knowledge of processes, allowed her to be a mentor manager in her previous role. She worked with peers to motivate and empower them to set and meet goals, be successful in their various roles, and help them overcome obstacles. She trained team members on business and optical processes, who in turn were responsible for training team members in other stores.

Kristina is excited to use her prior experience to help Private Optometry Practices thrive, through empowering Practice Owners to mentor and lead team members to be fully invested in the office and to provide an excellent patient experience.

Outside of the office Kristina is devoted to the success of her two children, Jaya and Tre'. She is involved in her community and church and enjoys spending time with friends and family.

## **Supporting Team**

### **Sarah Lier, Executive Administrator**

Sarah joined Acquios Advisors in January of 2016. Her journey in the industry began in 2013, by providing bookkeeping and payroll services to Optometrists throughout the United States. She has a thorough knowledge of an Optometry office's financials, and thus a deep understanding of the services delivered at Acquios Advisors.

Sarah is the "right hand" to our Advisors and can be found maintaining the company's Social Media presence via the Website and Facebook, putting together presentations for webinars or Workshops, creating and updating tools for our clients, making sure each client is scheduled for a call, among many other tasks.

Sarah shares a passion with the Acquios Team for client success. Whether it be financial growth or personal growth, Sarah enjoys walking with doctors and their teams as they find their definition of what success means to them.

Sarah and her husband, Drew, have two daughters, Lydia and Sophia, and a son, Lucas. Sarah enjoys spending time with her family, staying active with various types of exercise, coming up with healthy recipes for her family, reading and get togethers with friends.

## **Kendall Guinotte, Client Account Specialist**

Kendall joined Acquios Advisors in June 2018. She graduated from the University of Nebraska at Omaha with a degree in Business Administration, with an emphasis in Accounting. Kendall is preparing to become a licensed CPA. In August 2019, she became certified in QuickBooks Online. She enjoys applying her knowledge to helping our clients achieve success.

Kendall works closely with clients, assisting with their needs, creating tools that can be utilized by our Advisors, and maintaining Social Media presence.

Kendall and her husband, Patrick, enjoy watching movies, traveling, discovering craft breweries and spending time with friends and family.

## **Mackenzie Guinotte, Client Account Associate**

Mackenzie is an integral part of the Acquios Advisors Team, performing back end tasks such as: payment processing, Secret Shopper Calls, Website Evaluations, Market Analysis Reports, and more. She loves to learn new things, and she is thrilled to be a part of helping Private Practice Optometrists meet and exceed goals in their offices.

Mackenzie attends the University of Nebraska - Omaha, working toward a degree in Business Administration. She stays busy with her studies, her sorority, friends, and family.

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## **WHO WE WORK WITH:**

We work with Private Optometry Practices throughout the United States and beyond. We work with you - the owner - as well as the individuals in your office. We guide your team members to understand how they will make their career with you better, not only for themselves, but most importantly for the patient. When the service is better for your patients you see the results in increased revenues.

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## **WHAT WE DO:**

We discuss your concerns, thoughts and processes you are currently executing. We identify your opportunities, we assist you to improve efficiencies in your practice by developing your business plan which may include, but will not be limited to the following:

- Develop your Cash Flow Projection
  - Identify your Breakeven Point
  - Improve Patient Flow and Efficiency
  - Track Key Metrics
  - Increase Profitability
  - Increase Receipts per Patient
  - Increase Production and Efficiency in your Optical
  - Improve Employee Relations
  - Implement Human Resource Tools
  - Conduct On-Site Visits
  - Practice Valuations
  - Develop and Execute a Marketing Plan
  - Prepare and Guide for Bringing on an Associate
  - Transition Planning
  - ABO and COPE Approved Speaking
  - Deliver multiple workshops per year
  - Secret Shoppers and Website Evaluations
  - Unlimited Access to Library of Recorded Presentations and Monthly Webinars
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## **TEAM DEVELOPMENT AND CULTURE**

Team development and culture is critical to every business. Acquios Advisors recognizes the value of your team, for this reason we work with you to create processes to increase team/owner communication. We guide you to develop the tools necessary to empower your team to work better with you and create a culture of employee ownership. By empowering those individuals within your organization with the collective feeling of ownership and the “WHY,” the focus can be on your patient care.

### **Evolutions Workshop:**

**Human Resources:** Our Human Resources workshop focuses on Building Culture in the Practice. This training is two full days of interactive presentations, which are geared toward Doctors and Office Leaders. Attendees learn to select the right candidate, train and continue to develop your employees. This workshop guides and develops attendees to deliver productive interviews, motivate employees in a nurturing environment, and develop their skills to improve the office’s operations. This will increase accountability, along with appreciation, which in return will increase employee retention.

**Optical Enhancement:** Our Optical Enhancement workshop focuses on Enhancing your Optical. This training is two full days of interactive presentations, which will benefit every member of the team, but is especially geared toward Optical Team Members. Attendees learn how to manage the Optical processes, through both Business Care and Patient Care. This aids in increasing revenue, patient retention and satisfaction, reducing costs of goods, and increasing net profit.

**Financial Training:** Our Financial Planning Training, titled, “The Report Card,” focuses on Tracking Statistics and Budgeting. This Presentation is an interactive workshop to benefit Owners and other members of the team who make decisions regarding financials. Attendees learn why we track statistics and keep a budget, how we do these things, what we measure specifically, and how we can use this information to make our practice even better in every way.

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## **CASH FLOW ANALYSIS**

### **In order to manage it you must measure it.**

Our Tool gives you the ability to:

- project goals for your office
- measure production
- track accounts receivable
- manage expenses
- calculate the break-even point
- analyze the value of an Associate

To Summarize, we help you to get a more balanced paycheck each and every month.

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## WHAT WE HAVE EARNED AND WHAT WE HAVE LEARNED

With more than ten decades of combined experience, our team has earned the respect and confidence from clients who have come to appreciate the insight we deliver. We gain insight from every client we work with and share that knowledge with you. Change is not easy, we recognize that, we have walked many paths and are ready to assist you.

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## TESTIMONIALS

**Dr. Joanne Gronquist, Optometrist**  
Santa Barbara, California

*Rick's been in the industry for a very, very long time. He used to work in optometry, so he's seen it all. He knows everything in the field when it comes to vendors, staff and different optometric companies – and he's worked with so many doctors across the nation for so long that I can go to him with any question and he has an answer for it, or he can get an answer for me every easily. He brings the nation's optometry experience to my practice. That's powerful.*

**Dr. Dirk Gray, Optometrist**  
McCook, Nebraska

*Rick is so personable and down to earth, but practical as well. He's helped us with the business side of our entire practice, using his past experience to provide us with good insight and feedback about everything from finance and budgeting to the products we sell. He's taken a vested interest in our future – you can tell he really cares and wants us to succeed. I appreciate both his extensive knowledge and his sincere approach.*

**Dr. Jason Holtom, Optometrist**  
Red Deer, Alberta

*Rick's philosophy matches up with our own, and his recommendations are time-tested and proven to produce results. He has so much experience with many different kinds of optometry offices and the problems they all face. Since we started working with him, we've made tremendous changes to our office and office culture. We've really taken off in the last 4 years, nearly doubling our annual sales to be in the top 5% for a single doctor's office. Our increase in gross has all been due to our consulting and ideas from Rick. We rely heavily on him for our marketing, business plan, day-to-day office procedures and communications. The best thing we ever did for our practice was to use Rick's consulting services.*

**Dr. Kayla Gaddis, Optometrist**  
McKinney, Texas

*Over the past year, I have had the privilege of working with Kirk as I start my own optometric practice. Kirk's mentoring and knowledge of the field have been instrumental in my growth over this first year. He is very professional and maintains a positive attitude in stressful situations. I get asked all the time about the one thing that I would recommend to someone starting their own practice, and the first word out of my mouth is always a good consultant. Kirk has helped me build the team, materials and confidence I needed to make my practice a success!*



**Dr. Misty Bauder, Optometrist**

**Westerville, Ohio**

*I am so thankful that I chose to work with Acquios. As an upcoming new business owner, there have been so many questions and areas of the business that I honestly have had no knowledge about. Kirk and Rick have been incredible. They respond so fast, had the best financial terms of any I had seen, and have already helped me save so much money in the negotiations. The biggest thing that sets them apart for me is how personable and kind they are. So many others I have talked with have been stuffy and intimidating and just made me feel inadequate. I have never felt anything but encouragement and support to my unending questions. It's a small business that truly seems to care about ME and MY practice and not just a financial venture for them. I feel like they are both my advising team, colleagues and friends. It is by far the best business decision I have made as I know it will continue to positively impact every aspect of my business in the future. I can't wait to see where this new venture leads!*

**Kristy Patterson, Office Manager**

**Panama City, Florida**

*I have confidence that the Advisors at Acquios have our best interest in mind when they make recommendations. Because of their immense industry experience, combined with their high moral character, I know I can trust them to help us establish a game plan to deliver extraordinary patient care and grow our business at the same time.*

**Michael Farley, Practice Administrator**

**Radford, Virginia**

*We had the great opportunity to work with Kirk Kastens on multiple levels as a cold start practice. He was phenomenal in strategizing our next step and developing a system to make us productive from the start. We received terrific help with budgeting, goal setting, hiring, and patient scheduling as we continued to grow. Kirk's extensive experience in "real world" private practice was a tremendous asset to help us turn a dream and a vision into a reality. We found it easy to communicate and relate our needs, which enabled us to put a plan in motion. We would definitely recommend Acquios to help with your current needs and your future growth. Top notch!*

**Sheila Hay, Office Manager**

**South Jordan, UT**

*I feel like Acquios is always willing to listen, teach, offer corrections and ideas when needed, and they make it fun to learn.*

**Dr. Barry Frankel, Optometrist**

**Palm Springs, Florida**

*I've worked with Rick [since 2009], and he truly understands our business. He gets it. We're trained as clinicians, but we need help with the business aspect of eye care. Rick is our coach, adviser and advocate. If you're thinking about working with Acquios, sign up. I know you'll be happy with your decision.*

**Dr. Karen LeBlanc, Optometrist**

**South Pittsburg, Tennessee**

*Just wanted to tell you thank you. I would be way too nervous to make these big decisions and move forward without your business expertise. I can feel confident growing and moving forward because of you! Thank you. Have a great day!*

**Dr. Jeff Binstock, Optometrist**  
Redmond, Washington

*We would like to thank Rick and the entire team at Acquios Advisors for all their help during our practice transition. Over a year ago, my wife and I purchased an optometry practice. Rick and his team did an excellent job guiding us through the acquisition, hiring staff, and putting systems in place. In addition, Rick was able to help us understand the financial side of the practice. They are consistent with their communication with us and are always available when needed. We highly recommend Acquios Advisors to anyone that is purchasing a practice or wants to take the steps to improve their existing practice!*

**Dr. Jason Hurley, Optometrist**  
Rigby, Idaho

*Rick is definitely the real deal. He has been my advisor and friend for five years. With his efforts my staff realizes their true potential and work as a team to grow our practice. I now see my business through different eyes with his help. Thanks, Rick!*

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**REFERENCES**

- Dr. Brandi Deckard**, Bloomington, IN; Phone number is (812) 332-2020  
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