



ASSOCIATE -> OWNERSHIP GATEWAY PROGRAM

PRESENTED BY COMMONWEALTH TRANSITIONS

KEY FEATURES

1. **Retain your top talent associates** in the same mold as Fortune 500 companies such as Intel, Whole Foods and Aflac
2. Our program develops a **organizational platform** with customizable features that is fit **for seamless and endless expansion**
3. Attract and retain top talent by offering a clear **path to partnership** for the those associates that you as owner would want to partner with
4. **Defined route to ownerships** for associates without having to borrow money from the bank
5. We work with you to develop an organizational structure which clearly defines the associate entrance and exit from ownership, **avoiding messy "break-ups"**
6. **Utilizing the Corporate Model** for Restricted Stock units and customized reward systems based upon performance
7. **Share the responsibilities and rewards of multi-practice ownership**



TRANSITION TIMELINE

- Engagement letter signed and check sent by practice owner

1. DAY ONE

- Request for copies of all current Employment Agreements
- Request for current Operating Agreement for practice and DSO if applicable
- Request for MSA (Management Services Agreement) for review
- Practice Valuation Questionnaire application to be sent and Practice Financial/Data request sent to customer (for each location)

2. WEEKS
ONE TO
THREE

- Analysis and Valuation each practice and the entire entity as a whole begins (to be completed with 30 days of receipt)
- Current contract review with Client of Employment agreements, MSO and Operating Agreement
- Introduction to attorney for restructuring of Employment agreements, MSO and Operating Agreement

3. WEEKS
THREE TO
SEVEN
(IF ALL DATA WAS
RECEIVED BY END OF
WEEK THREE)

- Review with Client final Analysis and Valuation of each practice and the entire entity as a whole

4. WEEK SEVEN

- In-office full day at Commonwealth Transitions Headquarters (Charlottesville, Virginia)
- Review of overall New Operational Structure and Customized Restricted Stock award analysis, and presentation to client.

5. WEEK
EIGHT

- Drafting and finalizing of Custom Restricted Stock Award agreement with Attorney
- Finalizing new Employment Agreements, MSO and Operating Agreements

6. WEEKS
NINE TO
TWELVE

- In Client office ½ day roll out of New Associate -> Ownership Gateway program with Associates.

7. WEEK TWELVE