

Naden/Lean LLC

CPAs and Business Consultants

Timothy D. Lott, CPA, CVA

Equity Member

Professional Memberships

American Institute of Certified Public Accountants

Maryland Association of Certified Public Accountants

National Association of Certified Valuation Analysts

Maryland State Dental Association

Academy of General Dentistry

Education and Designations

December 1985
University of Baltimore,
Bachelor of Science in
Business Administration

May 1986
Passed Uniform Certified
Public Accountant's Exam,
First Attempt, CPA
Certificate issued August
1986

December 1997
Earned designation of
Certified Valuation Analyst
from the National
Association of Certified
Valuation Analysts

July 2003
Received Maryland Health
and Life Insurance License

November 2003
Received NASD Series 6
License

June 2008
Received NASD Series 7
License

July 2008
Received NASD Series 66
License

PRESENTATIONS

- University of Pennsylvania Dental School, *Life After Graduation from an Orthodontic Perspective*, February 2009
- Benco, *Where Dreams Come True, a New Office Build*, January 2009
- District of Columbia Dental Society Annual Conference, *How to Buy a Dental Practice*, April 2008.
- University of Maryland, Dental School, *Life after Graduation*, December, 2007
- Benco, *Where Dreams Come True, a New Office Build*, November, 2007
- University of Maryland, Dental School, *Life after Graduation*, October, 2007
- Maryland State Dental Association, *More Than Just Accounting...* ", September, 2007
- Benco, *Where Dreams Come True, a New Office Build*, May, 2007
- University of Maryland, Dental School, *Life after Graduation*, February, 2007
- DC Dental Society, *How to Financially Evaluate Practice Performance*, April 2005
- Anne Arundel County Dental Study Club, *How to Evaluate Practice Overhead Using Benchmarks*, April 2005
- DC Dental Society, *Retirement Options*, March 1998
- DC Dental Society, *Practice Budgeting*, March 1997
- DC Area Study Club, *When to Bring on an Associate*, 1996

ARTICLES

- The Medical Bulletin, *Ten Financial Management Tips for the Healthcare Professional*, September 2002
- The Maryland State Dental Association Newsletter, *Practice Management: Your Hygiene Team*, October 2002

BACKGROUND

Tim is a Partner with Naden/Lean, LLC, focusing on healthcare, with a specific concentration in the dental industry. He has been working with dental professionals for more than twenty years and advises his clients on tax and retirement planning, practice management and successions, personal and business budgeting, associate buy-in and shareholder/partnership agreements and practice start-ups.

Tim has participated in many practice mergers, acquisitions and buy/sell arrangements. He received the Certified Valuation Analyst (CVA) designation in 1997, acknowledging his knowledge and expertise in practice valuation issues. He has been a presenter at various dental study clubs and dental society meetings. Tim began his professional career with the accounting firm of Naden/Lean, LLC in September 1983 as an accounting intern.

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