

# Naden/Lean, LLC

A Professional Services Company of  
Certified Public Accountants 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

### **PRESENTATIONS**

- 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.

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**BACKGROUND (continued)**

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.

