

# PURPOSE DRIVEN PARTNERSHIP

*Roadmaps*

## Discovery

Alignment of vision  
and purpose for the  
partnership

## Preparation

Exposure to  
management and  
leadership styles

## 1st Buy In

Execute 1st Tranche  
Buy In (75%/25%)  
with management  
mentorship

## 2nd Buy In

Execute 2nd Tranche  
Buy In to establish  
50%/50% Purpose  
Driven Partnership



TUATARA

# PURPOSE DRIVEN PARTNERSHIP

*Phases*



## Discovery (90 Days)

Framework  
Introduction

Alignment and Vision

Compensation Best  
Practices

## Preparation (1-3 Years)

Paid administrative  
management exposure

Dr. Senior defines and  
documents management  
processes

Financial Forecast/  
Projections

Kolbe ® Assessment

## 1<sup>st</sup> 25% Tranche (3-7 Years)

Practice Growth

Additional management  
mentorship

Unanimous approval for sale  
and other defined major  
decisions

Seller financing, buyer's  
prerogative

## 2<sup>nd</sup> 25% Tranche (Ongoing)

Subject to established  
floor and ceiling

Long term structure

Equal management

Seller or bank financing,  
seller's prerogative



# One time engagement fee by phase

Fee due upon engagement acceptance

Discovery

**\$2,500**

Preparation

**\$5,000**

1st 25% Tranche

**\$2,500**

2nd 25% Tranche

**\$2,500**

