

Professional Services | Overview

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Curi Advisory Overview

With decades of direct experience in healthcare leadership and operations, our team partners with stakeholders to navigate complex issues and deliver leading business solutions.

We are action-oriented, roll-up the sleeves, partners – from strategy development through execution. We operate as extensions of the client team to accelerate value creation and achieve results.

Healthcare Industry
Consulting

Risk
Consulting

Revenue Cycle
Solutions

Data
Solutions

Accounting
Solutions

Healthcare Industry Consulting



Providers and Medical Groups



Hospitals, Health Systems, and Services Providers



Health Plans and Managed Care Organizations



Boards, Private Equity Sponsors, Strategic Stakeholders

Analyze. Plan. Execute. We partner side-by-side to achieve lasting **Operational Performance Improvement**.

From interim CFO services, to leading robust strategic planning processes, our team aligns **Growth to Financial Outcomes**.

Healthcare Transaction Experts. For every aspect of the deal life cycle. Our industry leaders drive **Speed and Efficiency to Value**.

The fast-moving healthcare landscape requires change. We turn **Strategic Initiatives into Organizational Capabilities**.

Operational Performance Improvement



- ✓ Interim Leadership
- ✓ Operating Model Design and Alignment
- ✓ Business Process Improvement
- ✓ Cost Optimization and Transformation
- ✓ Working Capital Improvements

Office of the CFO



- ✓ Interim CFO
- ✓ FP&A, Budgeting / Forecasting
- ✓ Physician Compensation
- ✓ Reporting Dashboards
- ✓ KPIs and Benchmarking
- ✓ Financial Systems
- ✓ Ad Hoc Analyses
- ✓ Liquidity Management

M&A and Transaction Services



- ✓ Buy-Side Team
- ✓ Sell-Side Team
- ✓ Integration Management
- ✓ Carve-Out Management
- ✓ Synergies / Dis-Synergies
- ✓ Transition Services Creation
- ✓ Due Diligence
- ✓ Valuation Services
- ✓ Partnerships and JVs

Enterprise Strategy & Transformation



- ✓ Change Management Office
- ✓ Strategic Planning
- ✓ Business Case Development
- ✓ Go-To-Market Strategy and Execution
- ✓ Organizational Structure, Systems, and Governance
- ✓ Systems and Processes

Risk Consulting

Our Difference

When your organization is ready for a proactive and comprehensive approach to risk management and preparedness, our team is in your corner.

We leverage Enterprise Risk Management (ERM) methodology as our foundation, using highly skilled staff, national industry experts, and evidence-based / peer-reviewed techniques, methods, and tools to enhance our client's organizational strategy for patient safety improvement and risk mitigation

We develop programs and solutions with a return-on-investment focus, assisting our clients from initial assessments through implementing recommended improvements.

Our Services

We are focused on strengthening operational functions, claims, risk, patient safety, and quality management programs, via:

Risk Assessments: Leveraging national claims trend data and best-practice recommendations, our range of service line and program assessments can help you refine and implement risk mitigation initiatives and measure improvement across your organization.

Claims Services: Using a powerful risk identification and classification system, built on clinical and legal expertise, our proprietary approach helps organizations analyze medical liability claims, identify patterns, and benchmark against national data

Advisory Services: Whether you need an on-call risk resource or a fully outsourced risk management program, our team provides expert and tailored guidance. We also offer underwriting support and strategic guidance for organizations managing their own risk and pursuing growth opportunities.

Education: Our nationally renowned experts and speakers bring the latest customized training, mentorship, and presentation programming to your organization, so you can be educated and fully prepared for any risk you face.

WE STREAMLINE RESOURCES AND TECHNOLOGIES WHERE THEY WILL HAVE THE GREATEST CASH COLLECTIONS IMPACT.

Revenue Cycle Solutions

Solution Overview

We leverage **technology** to route the **right account** to the **right representative** to maximize cash collections

Our team develops advanced analytics and **custom** business intelligence solutions to deliver **actionable** insights to help leaders streamline critical business decisions

Our Solution

Insurance A/R Resolution. End-to-end payer communication and issue resolution to reduce aging A/R and accelerate reimbursement.

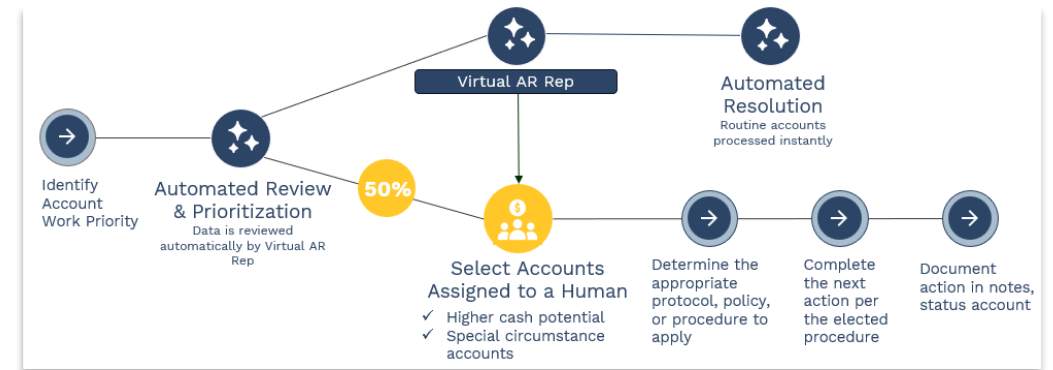
Denials Management & Prevention. Comprehensive appeals, root-cause analysis, and denial trend monitoring to recover lost revenue and reduce future denials.

Patient Financial Services. Compassionate outreach and billing support designed to improve patient satisfaction and increase balance recovery.

Flexible, On-Demand Workforce. Revenue cycle experts who integrate directly with internal teams to mitigate staffing shortages and turnover.

Custom Reporting & Performance Dashboards. Actionable analytics that identify patterns, bottlenecks, and improvement opportunities. Reporting provides transparent KPIs and full visibility into productivity, outcomes, and ROI.

How It Works



The Benefits

- ✓ **Optimized Cash Collections** – Our solution enables practices to achieve higher yield and full dollar capture through optimized processes and technology
- ✓ **Reduced Operational Burden** – Operational responsibilities are shifted to our team, allowing leadership to focus on strategic priorities and growth initiatives
- ✓ **Risk Minimization and Stability** – Predictable cost structures that reduce risk and provide financial stability
- ✓ **Strategic Growth Enablement** – Our solution supports growth, physician recruitment, and acquisition without adding complexity or overhead
- ✓ **Partnering With Curi** – As fierce healthcare advocates, business leaders, and thoughtful partners, Curi offers unmatched access and exudes a deep understanding of specific client circumstances.

Data Solutions

Dashboards & Reporting

Business Intelligence “Accelerators” allow our clients to gain access to powerful dashboards and reports that are user friendly and provide actionable insights you need to transform your practice operations and revenue cycle management.

Data Pipeline & Warehouse

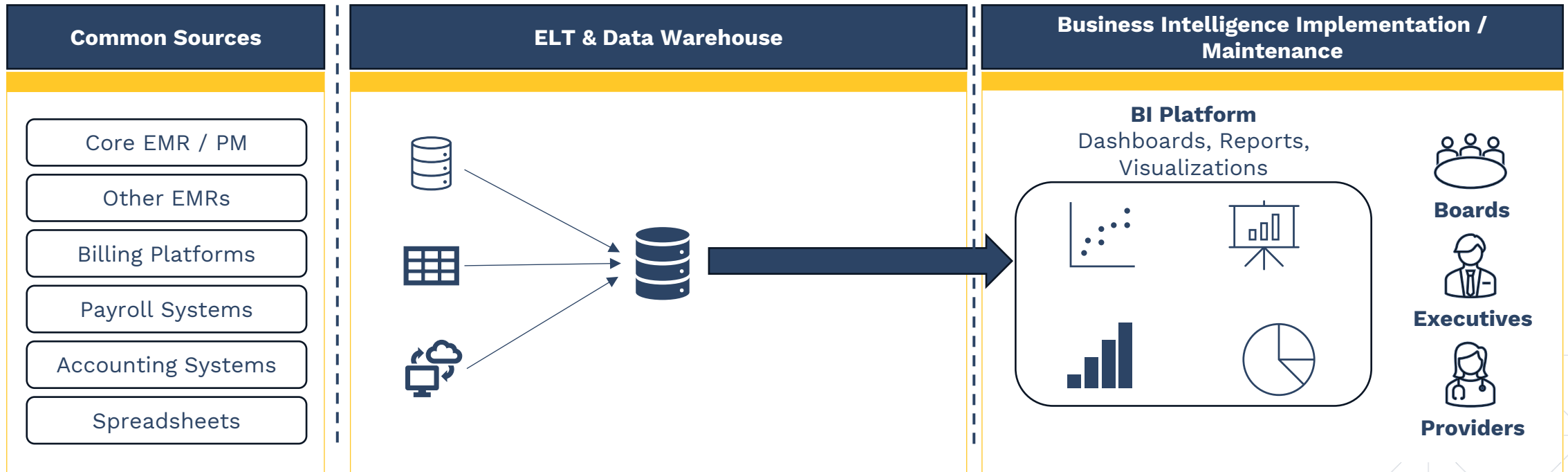
This solution sets you up with a platform to manage data from multiple sources and gives you access to our reporting accelerators.

Insights

Our experts will help you make sense of complex data, prioritize work queues, and optimize workflows, ensuring you can focus on what matters most; providing excellent patient care

Workflow Automation

Leverage robotic process automation to streamline and automate tedious processes to improve patient access and claims management.



Accounting Solutions

Our Difference

When your practice needs flexible, expert financial support, our fractional accounting team is ready to help.

We bring deep healthcare finance experience, trusted industry specialists, and proven tools to strengthen financial operations, discipline, and improve visibility into performance.

Our Services

Monthly Accounting & Bookkeeping: Accurate, timely financials built with healthcare-specific insight.

Financial Reporting & Analysis: Actionable dashboards, KPI tracking, and trend reporting tailored to your business.

Fractional CFO Support: Strategic financial leadership without the cost of a full-time executive.

Budgeting & Forecasting: Tools that help you understand your organization's future and make proactive decisions.

Revenue & Cost Analysis: Understanding what drives your financial performance—and where opportunities exist.

Curi Advisory Leaders



Brad Diericx is the CEO of Curi Advisory. Brad joined Curi in 2020 and has held several leadership roles within the organization, including Chief Commercial Officer and CEO of Curi Insurance. As the CEO of Curi Advisory, Brad utilizes his extensive institutional knowledge and depth of experience to optimize the company's growth strategy and ensure exceptional consulting solutions and services are provided to clients across the country.



Alex Kirk is a Sr. Managing Director with Curi Advisory and leads the Healthcare Industry Consulting practice. He has deep healthcare industry experience having executed complex engagements on behalf of provider groups, health systems, and managed care organizations. Alex has expertise in M&A, performance improvement, cost optimization, financial planning and analysis, strategy, and driving organizational change. He has worked with many leading healthcare companies, both publicly traded and privately held, for-profit and not-for-profit.



Margaret Curtin is a Managing Director with Curi Advisory and leads the Risk Consulting arm of the practice. With over 30 years of experience in risk management and patient safety, Margaret is a well-known leader in the field. In addition to the medical professional liability insurance industry, she has first-hand healthcare experience having worked in acute, managed, and ambulatory care settings. She has also held positions in provider relations, contracting, business development, marketing, education and underwriting.



Robert Peaseley is a Managing Director with Curi Advisory, bringing more than 18 years of outpatient healthcare accounting experience. Prior to joining Curi in 2022, Robert was a Financial Services Director at Atrium Health in Charlotte, North Carolina, in their Medical Group and Research and Grants departments. Robert has extensive experience in operational accounting, process improvements, and revenue cycle evaluation.



Chad Peters is a Managing Director with Curi Advisory and leads the Revenue Cycle Solutions arm of the practice. He is a senior healthcare revenue cycle executive with 30 years of experience leading enterprise transformation, M&A integration, and scalable operations across academic medical centers, integrated health systems, multi-specialty physician groups, and PE backed platforms. Known for delivering measurable EBITDA impact through revenue cycle optimization, enterprise software and automation deployment, and disciplined project leadership.



Dr. Satish Mathan is a Strategic Advisor with Curi Advisory. He is an experienced Leader and Radiologist with a demonstrated history of innovation working in the hospital & health care industry. Skilled in Interventional and Diagnostic Radiology, Clinical Operations, Practice Development, Healthcare Related Technology Innovation and Business Development. Experienced Board Member and advisor to growing companies for targeted strategic development.



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