Fewer Meetings. More Trust.

How Marshall Orthodontics keeps the business side simple with Spara handling the numbers

THE CLIENT

Marshall Orthodontics

Board-certified orthodontic care in Simpsonville, South Carolina • marshall-orthodontics.com

AT A GLANCE

THE OWNER

Dr. William Marshall — board-certified orthodontist building a practice that works for patients, team, and owner alike

THE RELATIONSHIP

A Spara client for more than five years — bookkeeping, reporting, and payroll

THE TRANSITION

A clean handoff from the prior bookkeeping arrangement, with no gap in continuity

THE RHYTHM

Quarterly reviews — with numbers he can rely on any day in between

SERVICES USED

- Accounting & bookkeeping
- Monthly close & reporting
- Expense monitoring
- Payroll oversight
- 401(k) workflow support
- Payroll system implementation
- Cash flow reporting
- Support for outside advisors

THE BOTTOM LINE

"Trust means accuracy and responsiveness. Spara always does that."

— Dr. William Marshall

THE PRACTICE

When Dr. William Marshall opened Marshall Orthodontics, he set out to build a business doing something he enjoyed — a place where patients have a good experience, the team enjoys coming to work, and the practice works well as a whole. Good for everyone involved, not just the owner.

But an orthodontist is also a business owner, and for Dr. Marshall the two roles blend into one: decisions on one side almost always affect the other. Beyond patient care sat marketing, customer service, HR, payroll, purchasing, the 401(k), and the bookkeeping — administrative work that often stretched into the evenings.

> *"I want to be able to rely on the numbers without having to verify everything myself."*
>
> — Dr. William Marshall, Marshall Orthodontics

WHY SPARA

More than five years ago, Dr. Marshall moved the practice's bookkeeping to Spara. The transition was clean — no gap, no lost continuity — and the relationship was comprehensive from the start: monthly bookkeeping and close, financial reporting, expense monitoring, and payroll oversight.

What mattered was having someone take responsibility for the work and deliver accurate, reliable financial information. Within a few months, Dr. Marshall was confident Spara was doing a great job with everything the practice had hired them to do — and that confidence set the tone for everything that followed.

THE RELATIONSHIP TODAY

The practice runs in a steady rhythm. Reviews moved from monthly to quarterly, Spara's periodic checks keep everything in place, and the reports stay accurate and ready — for Dr. Marshall whenever he wants to look, and whenever an outside professional needs information from the practice.

> *"Having Spara handle the financial side gives me accurate financial reports that I can rely on."*
>
> — Dr. William Marshall, Marshall Orthodontics

Fewer meetings. More trust.
Spara handles the numbers.

THE PARTNERSHIP, PHASE BY PHASE

Phase 1 • A Clean Handoff
Spara took over the practice's bookkeeping without a gap, so Marshall Orthodontics never lost continuity. The engagement was comprehensive from day one — monthly close, financial reporting, expense monitoring, and payroll — and within months the work had earned the owner's full confidence.

Phase 2 • Reporting Built for the Owner
Dr. Marshall wanted one view above all: every expense category as a percentage of revenue — payroll, marketing, clinical supplies — so he can compare quarters, spot anything getting out of line, and measure the practice against published industry standards. Spara's reporting delivers exactly that, accurate whenever he needs it.

Phase 3 • Payroll and Systems, Handled
Payroll runs accurately and on time, with Spara flexible whenever the practice needs something — including 401(k) questions and the workflows that come with the plan. When it was time to move to a new payroll platform, Spara handled essentially the whole implementation. In Dr. Marshall's words: "I didn't have to spend any time managing it."

Phase 4 • A Relationship That Right-Sized Itself
As the practice settled into a steady pattern, monthly review meetings had become routine — so Spara and Dr. Marshall moved them to quarterly, eliminating eight meetings a year without losing an ounce of confidence. Spara's periodic reviews keep everything in place, and the numbers stay reliable whether anyone is looking or not.

THE OUTCOMES

- **Numbers he can rely on** — a more organized financial operation, better reporting, and confidence in its accuracy — without checking the work himself
- **Payroll that just runs** — accurate and on time every cycle, with few if any errors — and expert help on 401(k) workflows
- **Eight meetings a year back** — monthly reviews became quarterly as trust matured — time returned, confidence intact
- **A simpler business** — "keeping it simple" now extends to the back office: payroll and reporting handled with little of his time
- **Focus where it matters** — the financial side is one less area to manage personally — in a day already stretched by evening admin work

IN DR. MARSHALL'S WORDS

"Trust means accuracy and responsiveness. I need to know that things are done correctly and that when I have a question or something needs attention, I'll get a timely response. Spara always does that."

"The transition to ADP was easy for me because Spara handled pretty much the whole thing. I didn't have to spend any time managing the implementation."

"There's a real opportunity cost to that time, so having people you trust to handle some of it is valuable."

"You don't have to do everything yourself. You can pay someone who's good at those things to help you."

"If another practice owner called me about working with Spara?
They're responsive, they do good work, and they've been reliable. I've been very happy."

Ready for a financial partner who earns your trust? spara.cpa

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