



## **April 9, 2021 L&E Presentation**

**“Where Do I Start? The Basics of Starting a Successful Private Practice”**

**Luke M. Martin, MBA, Esq.**

**SYLLABUS**

**CE: 1.5**

### **A. Title, Date & Time**

“Where Do I Start? The Basics of Starting a Successful Private Practice”

April 9, 2021

9:00 am – 10:30 am

### **B. Instructor Information**

Luke M. Martin, MBA, Esq.

CAMFT Staff Attorney

**Luke Matthew Martin, Esq.**, a member of the State Bar of California since 2011, joined CAMFT as a Staff Attorney in 2019. He holds a Master of Business Administration with honors and a Juris Doctorate Degree specializing in Child, Family and Elder Law with honors. Prior to coming to CAMFT, Luke ran a private practice focusing on civil litigation and represented several businesses with annual revenues in the millions. He has been recognized by the State Bar of California with the Wiley E. Manuel Certificate for Pro Bono Legal Services for his legal assistance in helping victims of domestic violence. In addition to his work at CAMFT, Luke is an adjunct professor for several universities lecturing on political science and business law and sits on University of Arizona’s Faculty Senate.

### **C. General information/Description**

Level of Learning: Intermediate

Have you ever wondered how to start a private practice? Have you ever wondered if you missed something when you started your private practice? The objective of this presentation is to introduce therapists to the basic steps required to plan, start and run a business. Topics such as creating and naming a private practice, how to hire an employee, and an overview of how to lawfully advertise the business will be reviewed in depth.

### **D. Educational Goals:**

Participants will learn the basics of how to start and operate a small business; identify the unique legal requirements for opening a therapeutic practice; and define and apply business terminology.

## **E. Measurable Learning Objectives:**

Participants will be able to:

- Identify the three most common forms of business ownership for therapists in California: sole proprietorships, general partnerships, and professional corporations.
- Explain the advantages and disadvantages of sole proprietorships, general partnerships, and professional corporations.
- Summarize how a professional corporation is formed, who owns it, and who is responsible for its operation.
- Discuss the legal requirements involved in hiring an employee for a newly created organization
- Compare and contrast the legal requirements for hiring an employee at the federal, state, and local level.

## **F. Outline:**

1. Organize Yourself
  - a. Plan Out Your Business
  - b. Anticipate Start-Up Costs
  - c. Figure Out Business Structure
  - d. EIN, NPI, and Business Bank Account
  - e. Business License Requirements
  - f. Insurance
  - g. Intake Forms, Policies, and Procedures
  - h. Hiring Staff
  - i. Advertising
  - j. Record Keeping
2. Creating a Business Structure
  - a. Creating a Sole Proprietorship
  - b. Creating a Partnership
  - c. Creating a Professional Corporation
3. Naming a Business Structure
  - a. Naming a Sole Proprietorship
  - b. Naming a Partnership
  - c. Creating a Professional Corporation
4. Hiring an Employee
  - a. Employee Handbook
  - b. State Laws
  - c. Federal Laws
  - d. Insurance
5. Record Keeping
  - a. Basics of Recording
  - b. Storage Requirement
  - c. Ownership