



CHADWICK O. BOGAR, ESQ.

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Chad Bogar is the firm's Founder and Managing Partner. Since graduating from law school, his practice has focused almost exclusively on Medicaid/Medicare eligibility & reimbursement (MMER) and related regulatory matters for long-term care providers. During the course of his career, Mr. Bogar has created a number of legal strategies, which have revolutionized how providers see MMER. Currently, he and his firm are applying those strategies to MCOs, MAPs, and a growing number of states attempting to recoup vital revenue from providers. Mr. Bogar's distinctive approach to MMER is both effective and unprecedented in the long-term care industry—an approach about which he is consistently educating his clients because of his deep commitment to ensuring that they only need his services in the most extreme of circumstances. Mr. Bogar graduated with honors from Gonzaga University and received his Juris Doctorate from Penn State School of Law. He is admitted to practice law in the Commonwealth of Pennsylvania and the United States District Court for the Middle District of Pennsylvania.



Sean Morrison, CPA

CLA (CliftonLarsonAllen LLP)

Principal
Quincy, Massachusetts

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Profile

Sean is a Principal within CLA's health care team, with a focus primarily on serving senior living and care organizations. He provides assurance, consulting, and reimbursement services, working with senior living organizations to help them navigate a constantly evolving aging-services environment, payment reform, and to realize their strategic dreams. Sean is also a frequent speaker at senior living and care association events.

Technical experience

- Skilled nursing facilities
- Assisted, residential, and independent living facilities
- Life plan / continuing care retirement communities

Education and professional involvement

- Master of business administration from Bentley University, Waltham, Massachusetts
- Bachelor of science in accounting from University of Massachusetts – Dartmouth, Dartmouth, Massachusetts
- Certified Public Accountant in the Commonwealth of Massachusetts
- American Institute of Certified Public Accountants
- Massachusetts Society of Certified Public Accountants

Recent Speaking engagements

- January 2023 – LeadingAge – “Getting Ready for the New PRF and ARP Rural Reporting Requirements”
- December 2022 – LeadingAge Connecticut – “Strategic Planning During Undertain Times”
- May 2022 – LeadingAge New York – “The Power of Pay: Compensation as a Strategy for Success” & “Strategic Planning During Undertain Times”
- April 2022 – LeadingAge Maine & New Hampshire – “Strategic Planning During Undertain Times”
- March 2020 – Lunch. Learn. Strategize., Rochester NY – “Exploring SNF Industry Trends”
- May 2019 and September 2019 – LeadingAge New York – “Thriving in a Highly Competitive Environment: Comparing the Not For Profit vs. For Profit Difference”

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Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor.





Taylor F. Puuri, CPA

CLA (CliftonLarsonAllen LLP)



Manager
Boston, MA

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Profile

Taylor Puuri is a manager within the health care industry of CLA, specializing in assurance services consisting of audit, tax, and Medicare and Medicaid reimbursement for hospitals/health systems and long-term care organizations. Taylor began her public accounting career at CLA in 2016. Specifically, she devotes her time to assurance engagements of hospital/health systems and long-term care organizations. Taylor has and continues to develop expertise in the evolving health care industry.

Technical experience

- Routinely manages engagements of health care facilities including health systems, hospitals, long-term care organizations, and home health agencies.
- Has a strong knowledge of health care entities and the environment – for profit, nonprofit, and governmental hospitals/health systems and long-term care organizations.
- Proficient in GAAP, GAAS, and GAGAS Standards, and related research techniques.
- Medicare and Medicaid reimbursement and cost reporting experience – Hospitals (CAH/PPS) and SNF's.
- Nonprofit tax returns (990, Schedule H and other related forms)
- Has worked with numerous computer spreadsheets which are routinely used in financial models, reimbursement analyses, and operational and process improvements by the client's she serves.

Education and professional involvement

- Bachelor of Business Administration in Accounting and Management from McKendree University, Illinois
- American Institute of Certified Public Accountants
- Certified Public Accountant in the states of (Massachusetts, Missouri)
- Missouri and Massachusetts Society of Certified Public Accountants
- Member of the Healthcare Financial Management Association (HFMA)

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“No one wants to be a housekeeper” Ralph Peterson says. “You think it is tough finding and recruiting good help in your field, try doing it in housekeeping – where the attrition rate is 7 out of 10.”

Ralph began his management career hiring, promoting & training managers in one of the toughest fields there is: Housekeeping.

Ralph Peterson, a US Marine Veteran, a Management Development Coach, and the CEO and Founder of #1 Virtual Training Center for Housekeeping Managers in Long-Term Care, doesn't pull any punches.

With 20 years of management training experience, specifically in Senior Care, Ralph is the leading expert.

He is a Professional Keynote Speaker, a Master Examiner with the American Health Care Association (AHCA/NCAL), a highly sought-after management development coach and #1 Best-Selling Author.

Ralph is currently serving as the President Elect of the National Speakers Association, NYC Chapter.



Patricia Raskin is recognized as the "powerhouse voice" behind positive lifestyle, health, wellness, and inspirational programs. She is a "positive media" pioneer for almost four decades and is an award-winning radio producer, business owner and leader. For four decades Patricia has been a trailblazer for positive messaging through her media work, corporate training and podcast coaching.

Credentials

- 4 decades of training and facilitating communications and wellness workshops
- 4 decades of producing media programs that focus on the positive with guest experts in their fields
- Produced two documentaries, "Positive Aging in North Carolina" and "The Older Worker in North Carolina - aired on the PBS affiliate in North Carolina. 1995-1996
- Produced and delivered a radio program series on WPRO and workshop series on "Positive Aging" for Blue Cross and Blue Shield of Rhode Island and Age-Friendly Rhode Island - 2018.
- Hosted and co-produced a 13 week "Positive Aging" podcast series produced by Rhode Island PBS - 2022. <https://www.buzzsprout.com/2025964>.
- Designed and delivered webinar series Aldersbridge Communities - 2022

Degrees

B.S. in Education Lesley College (University). M.Ed. in Guidance and Counseling Salem State College (University)