

**Building an Integrated Practice**  
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    **Wholistic. Integrated. Probably not the first two things you'd imagine when you think about a BV practice. They may represent an entirely profitable approach to building and sustaining one, however. Today's small practice has to seek out ways to differentiate itself.** A more integrated service mix can increase your value to clients and referral sources. Bill Barrett, of Barrett, PC, discovered that from the marital dissolution work he was doing.  
  
    Barrett's approach is to take a more wholistic view of the - obviously emotional - circumstances surrounding the parties. He is there to serve them as a financial advisor as they work through the issues that confront them. To begin with, then, merely taking a broader view of your role can help you discover additional service you can offer. The client needs a broader overview of the situation, he says. In Barrett's case, the mix is built around getting the parties through their decision-making as painlessly as possible.  
  
    At one end of the spectrum, there's the court appearance in a case that's become a battle already. It's not hard to imagine forensic accounting being called for in such a case. The alternative, of course, being ADR. Both are in Barrett's toolbox. Seeing these opportunities can sometimes require a fresh look at your practice. Settlements can be facilitated, whether in court or through ADR, with the introduction of financial planning perspective. Parties with heirs to consider would also benefit from estate tax consulting. Again, Barrett's integrated approach makes these services available to his clients.  
  
    The key, Barrett says, is to be a true neutral. Playing more of a facilitator role can open up other avenues of service as the parties realize you bring no opinion but that which is informed by your background and experience. Barrett reflects the wholistic approach not only in the mix of services, but in how they're delivered. He has been engaged by the court, for example, to serve as the single valuator for both sides. He makes his analysis transparent and seeks regular buy-in from opposing counsel. The resulting valuation, he says, becomes more acceptable and the overall settlement process less rancorous.  
  
    The path to a successful integrated practice isn't easy, or short. In the end, it's about being a problem-solver for clients. Even something as simple as finding a way for adverse parties to continue to be served by the same CPA firm following the divorce and be a very useful contribution to letting people get on with their lives.  
  
    

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