

CLIENT SUCCESS STORY:

Expert Guidance for a Trusted Long-Term Care Facility

Client: Multi-State, Multi-Facility Long-Term Care Organization
Industry: Long-Term Care

BACKGROUND:

A respected operator of long-term care facilities across the U.S., the client had built its reputation on providing high-quality care for aging populations in supportive, community-focused environments. While dedicated to residents and staff, the organization faced growing financial and regulatory complexity.

Multi-state tax filings, frequent audits, evolving Medicare and Medicaid regulations, and annual employee benefit plan requirements created pressure on already stretched internal resources. Tight margins in the long-term care industry further heightened the need for proactive tax planning and strategies that could uncover savings opportunities.

To strengthen compliance, reduce tax risk, and position for sustainable growth, the client partnered with Meaden & Moore's tax professionals, supported by audit and benefit plan specialists.

AT A GLANCE

Benefits:

- Strategic Tax Planning & Savings Opportunities
- Reduced Multi-State Tax Exposure
- Streamlined Audit Support
- Proactive Employee Benefit Plan Compliance

Challenges:

- Complex Multi-State Tax Filings
- Rising Regulatory Demands
- Limited Internal Finance Resources
- Need for Long-Term Tax Efficiency

THE CHALLENGE:

The client required more than compliance—they needed a forward-looking partner to help them manage multi-state filings, identify tax efficiencies, and ensure full compliance while navigating an evolving healthcare environment. The goal was to create both immediate savings and long-term planning strategies, without adding burden to their internal finance staff.

OUR APPROACH:

- **Strategic Tax Planning:** Our tax team conducted a deep review of prior-year filings and current operations, identifying opportunities to reduce exposure, capture deductions, and improve overall tax positioning.
- **Multi-State Compliance:** We implemented processes to streamline filings across jurisdictions, ensuring timely, accurate reporting while reducing audit risk.
- **Strategic Planning & Consulting:** Leveraging industry-specific insights, we provided targeted guidance that generated meaningful tax savings for long-term care facilities, helping them manage rising costs and strengthen operations.
- **Integrated Support:** With audit and benefit plan specialists engaged as needed, the client received cohesive support that minimized disruption to operations.

“In long-term care, financial health and regulatory confidence go hand in hand. Our role at Meaden & Moore is to help clients navigate complex requirements with clarity, while building lasting partnerships based on trust, responsiveness, and industry insight.”

— Kate Protsenko-Blake, CPA

THE OUTCOME:

- **Enhanced Tax Savings & Efficiency:** Proactive strategies uncovered new savings, optimized multi-state compliance, and improved filing accuracy.
- **Reduced Risk:** The client gained greater confidence in its compliance and reporting, lowering exposure to penalties and costly audits.
- **Operational Relief:** With Meaden & Moore managing complex filings and planning, internal staff could focus on strategic initiatives rather than administrative burdens.
- **A Long-Term Partner:** The client gained not just compliance support, but a strategic tax advisor invested in their future success.

MEADEN & MOORE'S DIFFERENTIATORS:

What sets Meaden & Moore apart is our ability to go beyond compliance and deliver true strategic tax value. For healthcare and long-term care providers in particular, tax efficiency directly impacts an organization's ability to reinvest in facilities, staff, and patient care.

Our differentiators include:

- **Industry-Specific Tax Expertise:** We understand the unique pressures of long-term care—from reimbursement structures and cost reporting to state-specific tax credits and incentives.
- **Proactive Planning vs. Reactive Filing:** Rather than waiting until year-end, we identify and implement tax strategies throughout the year, positioning clients to capture opportunities as they arise.
- **Integrated Services Under One Roof:** By aligning tax planning with audit and employee benefit plan services, we deliver seamless guidance that addresses the entire financial picture.
- **Proven Multi-State Capabilities:** Our team brings deep experience with multi-jurisdictional compliance, helping clients reduce complexity, avoid penalties, and uncover state-level savings.
- **Long-Term Partnership Mentality:** We view ourselves not as outside consultants but as embedded advisors who evolve with each client's needs, goals, and growth strategy.



Kate Protsenko-Blake, CPA

Vice President, Tax Services Group

✉ kprotsenko-blake@meadenmoore.com

KATE PROTSENKO-BLAKE'S PERSPECTIVE

"This engagement demonstrates how thoughtful, forward-looking tax planning can transform a client's outlook. By combining our tax, audit, and benefit plan expertise, we didn't just help this organization stay compliant—we created efficiencies and savings that directly supported their mission of care.

In long-term care, every dollar saved in taxes is a dollar that can be redirected to patient services, facility improvements, and employee support. That's the real impact of proactive tax strategy.

What I'm most proud of is the way our team anticipated challenges before they became problems—whether it was navigating multi-state filings, tightening internal controls, or preparing for evolving regulations. Our collaborative, hands-on approach gave the client confidence and clarity, freeing their internal team to focus on what matters most: their residents."