

# Soar to new heights with the right partner.



**UPSTREAM**  
REHABILITATION

## what we can do for you as an UPSTREAM PARTNER

At Upstream, we're experts at building successful partnerships. When you become a partner, you'll be joining a family of more than 600 partners dedicated to clinical excellence, professional development, and supporting the communities in which we serve. We'll work closely with you to identify and support growth initiatives and expansion opportunities, create greater access for patients and providers, and provide you and your staff with professional development pathways (including continuing education, advanced certifications, residencies and fellowships, and leadership development programs specific to each level of advancement).

### SERVICES TO MAKE OUR PARTNERSHIPS SUCCESSFUL

As an Upstream partner we'll take care of operational distractions like revenue cycle (i.e. billing and collections), compliance, human resources, recruiting, marketing, accounting, information technology, contracting and credentialing, medical records, and much more. That way, you can stay focused on what's really important—providing great patient care and expanding your footprint in the market.

### UPSTREAM HAS A STRONG TRACK RECORD OF HELPING OUR PARTNERS GROW

Upstream is the industry leader in de novo (new clinic) growth and we've built a robust infrastructure to help our partners strategically expand by adding new clinics in their communities. We also help our partners expand through acquisitions (strategic tuck-ins), as well as developing existing service lines and introducing new ones. Upstream leads the nation in de novo growth, averaging three clinics per week with our partners in 2021.

2018	➡	64 NEW CLINICS
2019	➡	100 NEW CLINICS
2020 (COVID)	➡	53 NEW CLINICS
2021	➡	152 NEW CLINICS

### HOW DOES THE VALUATION PROCESS WORK?

We recognize that every business is different. We also realize that every business deal can be equally as unique. During the valuation process, we will review the brand reputation, business financials, operational metrics, historic trends, and other key performance measures in order to determine the maximum value for your practice. Once that is completed, we'll discuss the best equity options based on personal goals and financial objectives.

“Upstream has brought a comprehensive structure and training system that gives my PTs the growth opportunities that they have been desiring. This includes partnering in new clinics and gaining equity as they grow. I am excited to grow with Upstream!”

**MINDI**

**OASIS PHYSICAL THERAPY**



“Our decision to partner with Upstream was based on their strength and capabilities to provide all with a shared vision of providing the best patient-centered care.”

**MADHU & AJAY**

**PHYSICAL THERAPY &  
REHAB SPECIALISTS**

The Upstream family is dedicated to fulfilling our mission, vision, and values each and every day. They are our guiding principles that ensure exceptional patient care, continued growth of our company, professional development of our associates, and the drive to support our communities and people in need. If you share a similar vision and values, we'd love to explore what an Upstream partnership would look like with your practice.

## Mission

To inspire and empower the lives we touch, to serve our communities, and to lead with purpose-driven passion.

## Vision

Through exceptional care and remarkable experiences, we choose to be the outpatient provider, employer, and partner of choice.

## Values

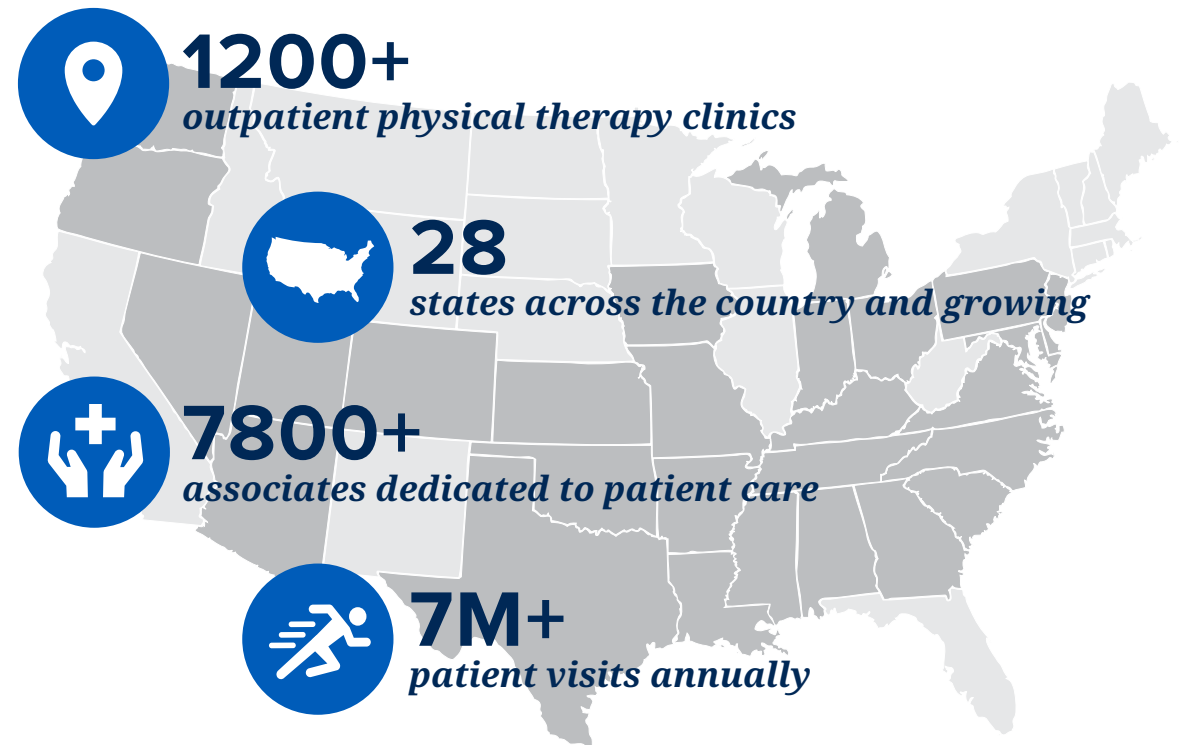


**UPSTREAM**  
REHABILITATION

Upstream Rehabilitation is an industry-leading and patient-centered company with over 1200 locations coast to coast. We are committed to providing evidence-based interventions, wholeheartedly serving our communities, and investing in our people.

Through exceptional care and remarkable experiences, we choose to be the outpatient provider, employer, and partner of choice. We make it a priority to invest in our partners and associates, no matter where they are in their clinical journey. With our proven track record of growth, we're one of the nation's fastest growing physical therapy networks.

*At Upstream Rehabilitation, we are passionately committed to leading the way to good health — it's our business.*





## Choosing the right strategic partner will help your practice soar to new heights.

Upstream Rehabilitation can help you navigate the process of valuing the equity you've built in your practice and propose alternative transactions based on your financial needs, risk tolerance, and future plans. Whether a complete sale of your practice or retaining equity through a partnership, Upstream will help you decide the best path forward while ensuring the highest valuation for your practice.

**“The partnership freed me to be the leader I have always wanted to be. I am able to focus on my leadership strengths and grow the business.”**

— ERIC, ROCKY MOUNTAIN SPINE & SPORT PT

### **THERE IS SAFETY IN NUMBERS**

With over 1200 clinics, and as our industry continues its rapid consolidation, our more than 600 equity partners know the benefit of being part of a larger family. Upstream has a proven track record of helping our partners grow and expand their operations, while mitigating personal risk.

We provide the tools and resources that allow our partners to concentrate on the aspects of their practice that they enjoy, while leaving many of the time-consuming and difficult tasks to Upstream.

### **PROTECTING YOUR LEGACY**

We recognize that every practice and every situation is different. We also realize that every business deal is unique, reflecting personal and professional objectives. We will work with you to develop a realistic partnership model to achieve your short-term and long-term goals and to protect the legacy you have created in your community.

We've already helped more than 600 partners, and we invite you and your staff to become part of the Upstream family, too.







Creating lasting, positive change together | [pillarswithpurpose.org](http://pillarswithpurpose.org)

## Giving a helping hand to those who need it

Upstream's Pillars with Purpose is the first ever formalized giving vehicle for associates of Upstream Rehabilitation and its partner brands, supporting charities that our associates hand pick. The Pillars with Purpose Benevolent Funds aim to create lasting positive change in Upstream communities and in other places around the world through volunteerism, fundraising, and grant-making.

Our commitment to serving the community is just as strong as our commitment to serving patients. Our guiding principles extend far beyond the walls of our clinics and the hours in which we operate. Our culture is based upon stewardship and servanthip, with the expectation that each member of our team will make a difference in the lives of those around them, one person and one community at a time.

Through financial contributions and the volunteer efforts of our employees, we strongly support many non-profit programs and organizations, on both a local and an international level. Serving our communities is a company-wide responsibility, which is why each full-time associate is given one paid charity day each year so that they can give back to their local community.



**Family & Children Welfare**



**Cancer Research & Patient Care**



**Military Personnel & Family Care**



**Emergent Needs**



**Faith Based Initiatives**



**Domestic & International Missions**



**Charitable Giving**



**Upstream Associate Hardship**

.....  
*Since its founding, Upstream's Pillars with Purpose has supported programs that served hundreds of communities around the world, with donations totaling over \$1,000,000!*  
.....



Mission Trip to Guatemala



Blood Drive at Birmingham Business Office (AL)



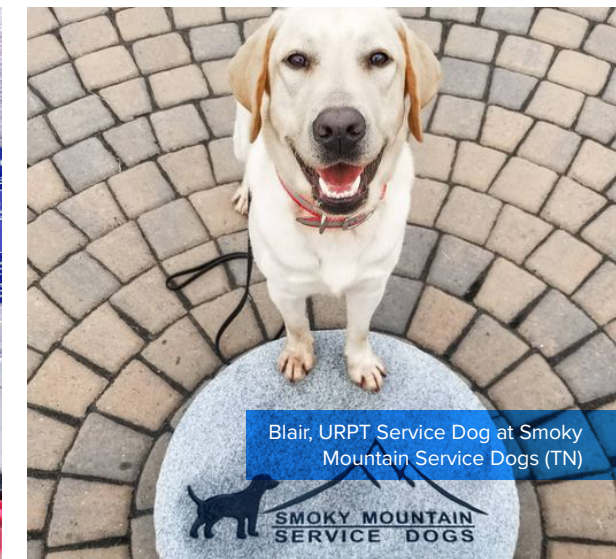
Central Pennsylvania Food Bank Grant Presentation and Volunteer Day (PA)



Sole Purpose Shoe Collection at Covington Clinic (GA)



Bravery Bag Drop-off at Monroe Children's Hospital (TN)



Blair, URPT Service Dog at Smoky Mountain Service Dogs (TN)





# INDUSTRY-LEADING *post-professional education*



**UPSTREAM**  
REHAB INSTITUTE

[UpstreamRehabInstitute.com](http://UpstreamRehabInstitute.com)

Upstream Rehab Institute (URI) is a national leader in providing high-quality and innovative post-professional education, including an **Orthopedic PT Residency, Sports PT Residency, Orthopedic Manual PT Fellowship, Hand Therapy Fellowship and Pelvic Health Development Program**. All of our offerings center around the development of skilled clinical reasoning and hands-on skill development, informed by knowledge of best evidence and integration of the values and characteristics unique to each patient. Programs can be completed from almost any Upstream clinic. Program features include:



**LEARN  
FROM THE  
EXPERTS**



**PORTABILITY**



**INNOVATIVE  
LEARNING  
FORMAT**



**STRUCTURED  
1:1 MENTORING**



[iamt.org](http://iamt.org)

Additional continuing education opportunities are available through Upstream's partnership with the Institute of Advanced Musculoskeletal Treatments to provide **exceptional continuing education learning experiences**. IAMT is focused on offering a wide range of specialty certifications and courses designed and taught by leading practitioners. Our courses are designed to cultivate experts in the fields of physical therapy, occupational therapy, and athletic training. These courses provide a practical, hands on approach to patient examination and treatment, and include:

- 50+ unique live courses offered across the nation
- Certification tracks:
  - COMT (Certified Orthopedic Manual Therapist)
  - ACOMT (Advanced Certified Orthopedic Manual Therapist)
  - OPC (Orthopedic Proficiency Certification)
  - Vestibular Rehab Certification
  - Dry Needling Certification
  - Pelvic Health Certification

## PROGRAM *stats*

### COHORT SIZES

Ortho Residency: 65  
Sports Residency: 15  
OMPT Fellowship: 10  
Hand Fellowship: 10

# 91%

Board exam pass rates  
(Residency trained)



We understand that choosing a partner is one of the most important decisions you will ever make. Whether you are looking for a partner to help accelerate your growth, to provide leadership and professional development opportunities, or to begin developing an exit strategy, aligning yourself with the right partner is critically important. We have more than 600 partners that chose Upstream because they recognized the value of the resources we provide to help them achieve their goals. We're flexible in the way we approach each partnership and we understand that each of our partners may have different goals depending on their stage in life and future plans.

Our mission is to inspire and empower the lives we touch, to serve our communities, and to lead with purpose-driven passion. We work diligently with our partners to provide excellent patient care, create more access to therapy in our communities, and ensure that therapy services are at the forefront of the MSK delivery model. As you review this partnership guide, I am confident that you will see the commitment we've made to our partners, associates, and communities to be the definitive industry leader.

Best wishes for continued success and we look forward to speaking with you soon.

Sincerely,

**RON KUERBITZ, CEO**  
**UPSTREAM REHABILITATION**



# Ready to soar with Upstream?



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[urpt.com/partnerships](http://urpt.com/partnerships)

## THE UPSTREAM REHABILITATION FAMILY OF CLINICAL CARE

