



**UPSTREAM**  
REHABILITATION


**BenchMark**  
PHYSICAL THERAPY

**Drayer** | PHYSICAL  
THERAPY

# **PARTNERSHIP** guide

**The right partner can make all the difference.**





## Choosing the right partner can mean the difference between success or failure in reaching your goals and expectations for the future.

As a partner with Upstream, we help you identify the objectives you want to achieve for your practice and then provide you with infrastructure, capital, tools, and resources to help make it a reality. We've built our success by delivering on the promises we make to our partners and exceeding their expectations every day.

We're flexible with how we build our partnership with your practice. Your operational role can vary based on your own personal and professional goals and objectives. Some partners choose to be clinic directors or treating therapists, while others pursue leadership roles as area or regional directors. We'll work with you and your team to ensure our partnership provides opportunities for continued personal and professional growth.

We are looking for practice owners who are like-hearted and like-minded in culture, goals, and philosophy of care. When you join our family, you are able to retain a range of equity or ownership based on your own financial needs, risk tolerance, and plans for the future. Our flexible transaction design allows you to benefit from the continued growth of the business that you created while achieving economic security with an established, proven partner.

Upstream is the industry leader in de novo (new clinic) growth and we've built a robust infrastructure to support our partners to help them strategically expand by adding new clinics in their communities. If you had the resources, would there be opportunities to open additional clinics in and around your market? If so, Upstream is the partner for you!

**Becoming a partner with Upstream has provided me with the unique opportunity to grow a small business that serves my local community, while having strong support from a nationwide organization. — CHRISTINE, SERC PT**



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



ACCOUNTABILITY



ADAPTABILITY



BALANCE



COMPASSION



EXCELLENCE



INCLUSION



INVESTMENT



SERVANTHOOD



TEAMWORK



TRUST



**UPSTREAM**  
REHABILITATION

Upstream Rehabilitation is an industry leading and patient-centered company with over 700 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.***



**700+**

*outpatient physical therapy clinics*



**26**

*states across the country and growing*



**6000+**

*associates dedicated to patient care*



**5M+**

*patient visits annually*

# what you can expect 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 6,000 associates and 300 partners dedicated to a philosophy of care that puts the patient first. We commit to you that as a partner we will always make decisions together and do what is in the best interest of your practice, patients, and staff. We'll work closely with you to identify and support expansion opportunities to gain market share and create greater access for patients and providers, and we'll provide you and your staff with professional development pathways such as continuing education, advanced certifications, residencies, fellowships, and leadership development.

Upstream Rehabilitation is built on a foundation of ownership by physical and occupational therapists, so we understand how the daily administrative tasks like billing, accounts receivable, payroll and benefits administration, staffing, and accounting can impede growing your practice and delivering patient care. Here are a few of the operational benefits that Upstream provides to our partners:

- Revenue cycle management
- Human resource and benefits administration
- Payroll administration
- Recruiting services
- Accounting and financial planning
- Regulatory and compliance oversight
- Sales and marketing services
- Legal services
- Clinical services
- Purchasing and facilities management
- IT support and services
- Professional development (con ed, residencies, fellowships, leadership)
- Credentialing
- Lease negotiations
- Architectural design
- Market research
- Many, many more....

## HOW THE PROCESS WORKS

We recognize that every practice is different. We also realize that every business deal can be equally as unique depending on your financial needs, risk tolerance, and future plans. We will work with you to develop a model that makes sense for your short and long-term goals and to protect the legacy you have created in your community. Once we have agreed to explore a partnership, we'll enter into a non-disclosure agreement (NDA), and begin an analysis of the financial and operational performance of your practice in order to provide you with a valuation. Once that is completed, we'll discuss the best equity options and structure to ensure the success of our partnership.

“The valuable resources provided through Upstream allow me to feel secure with my investment as a partner. Through this partnership, my team and I have new opportunities for financial, professional, and personal growth daily.”

**MEGAN**  
**BENCHMARK PT**



“Being a partner with BenchMark has given me the power to make a financial impact within my family and community.”

**AARON**  
**BENCHMARK PT**





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

## Giving a helping hand to those who need it

Upstream's Pillars with Purpose Benevolent Funds are the first ever formalized giving vehicle for associates of Upstream Rehabilitation and its partner brands to give to a multitude of benevolent funds which ultimately support charities that our associates hand pick. The Pillars with Purpose Benevolent Funds—which include six specific funds, one general fund, and one associate hardship fund—aim to create lasting positive change in Upstream communities and in other places around the world.

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, both on a local and an international level. Serving our communities is a company-wide expectation, which is why each full-time employee is given one paid charity day each year in which 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 2018, Pillars  
with Purpose has  
supported programs  
that served hundreds  
of communities around  
the world, with  
donations totaling  
over \$250,000!*

.....





Upstream Rehab Institute is a national leader in the provision of high-quality and innovative post-professional education. 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.

PROGRAM
features



**INNOVATIVE LEARNING FORMAT**

Our programs utilize a variety of teaching formats, including directed learning, self-paced learning, on-line instruction, on-site lab demonstration/practice, discussions, lecture, and exams.

**STRUCTURED 1:1 MENTORING**

As a program participant, you'll have access to an elite therapist with the knowledge and experience to provide you with focused one-on-one guidance throughout your program experience.



**PORTABILITY**

Many of our programs integrate on-line learning that you can access anywhere at any time, making things more convenient for you.

**LEARN FROM THE EXPERTS**

The majority of our Upstream Rehab Institute faculty are fellowship trained, as well as certified in a wide variety of specialties. When you enroll in a URI program, you're learning from the best.



We understand that choosing a partner to align your practice with is one of the most important and eventful decisions you will ever make—and choosing the right partner can mean all the difference in your success. Whether you are looking to partner as part of an exit strategy, growth strategy, or access to professional development and leadership opportunities for you and your staff, having the right partner to provide you with the tools and resources to achieve those goals is critically important. We're flexible in the way we approach each partnership and understand that each partner will have different goals depending on where they are in life, their risk tolerance, and what their plans are for the future. Our partnership success is built upon the trust we create with our partners and the promises we keep.

Every day we strive to inspire and empower the lives we touch, to serve our communities, and to lead with purpose-driven passion. It's ingrained in our culture and actions, and is the guiding mission within Upstream and our family of affiliated brands. We hope that as you looked through this guide, you got a better sense of who we are as a company and the important role our partners play in the continued growth and success of our business. We'd welcome the opportunity to explore a partnership opportunity with you and your team and look forward to speaking with you soon.

Until then, best wishes for continued success in all that you do.

Sincerely,

DAVE VAN NAME, CEO  
UPSTREAM REHABILITATION



PROGRAM
stats

**COHORT SIZES**

- PT Residency: 60  
PT Fellowship: 6  
Hand Fellowship: 8  
Sports Residency: 5

80%
vs
91%

Board exam pass rates  
(Non-residency trained)

Board exam pass rates  
(Residency trained)



If you'd like to explore a partnership with Upstream Rehabilitation, please contact:

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**BenchMark**  
PHYSICAL THERAPY

**BETHESDA**  
PHYSICAL THERAPY

**BEYOND THERAPY**  
PHYSICAL, OCCUPATIONAL & SPEECH THERAPY  
for kids

**Drayer**  
PHYSICAL THERAPY

**EMITE**  
PHYSICAL THERAPY

**INTEGRITY**  
PHYSICAL THERAPY

**Physical Therapy & Hand Specialists**

**ORTHOPEDIC**  
REHABILITATION ASSOCIATES

**Peak**  
PHYSICAL THERAPY

**MaxMotion**  
PHYSICAL THERAPY

**NW SPORTS**  
PHYSICAL THERAPY, INC.

**physiofit**

**PINN**  
PHYSICAL THERAPY

**SPINE & SPORT**  
Physical Therapy

**SERC**  
Physical Therapy

**SUMMIT**  
PHYSICAL THERAPY

**VIP**  
PHYSICAL THERAPY