



NCPA Ownership Workshop, Sponsored by McKesson Live Conference with online prerequisite work

Agenda – July 11-12 Live and On-Demand

It's a soup-to-nuts crash course on pharmacy ownership, whether you're starting from the ground up, purchasing an existing store, or expanding to become a multi-store owner.

**On-demand pre-requisites (Approximately 11 hours) Watch on-demand,
on your schedule ahead of the live event.**

On-demand topics include:

- Starting a Pharmacy from Scratch
- Critical Components of a Pharmacy Business Plan
- Financial Analysis and Due Diligence: The Essentials For Buying a Pharmacy
- Pharmacy Ownership: Corporate Structure and Asset vs. Common Stock Purchases
- Site Selection
- Floor Plan, Product Placement, and Merchandising to Sell
- Marketing Your Message!
- Establishing Your Pharmacy's Digital Footprint
- Establishing Your Pharmacy's Social Media Presence
- Enhancing Your Image with OTC
- Pharmacy Compliance for Pharmacy Owners
- Buying and Selling, Marketing, and Other Legal Issues
- Post-Close: Implementing Fundamental Accounting In Your Pharmacy

Speakers

Bonnie Bond, CPA, Sykes & Company, P.A.

Dennis Song, RPh, Owner, Flower Mound Pharmacy & Herbal Alternatives

Erin Rexroth, Director of Marketing, NCPA

Gabe Trahan, Former Senior Director, Store Operations and Marketing, NCPA

Jeff Baird, Esq., Chairman, Health Care Group, Brown & Fortunato, P.C.

Joshua Potter, Director of Compliance, PRS Pharmacy Services

Ollin Sykes, CPA, CITP, CMA, President, Sykes & Company, P.A.

Schwanda Flowers, PharmD, Managing Director, First Financial Bank

Scotty Sykes, CPA, CFP®, vice president, Sykes & Company, P.A.

Scott Weaver, Vice President of Pharmacy, PRS Pharmacy Services

Part 1: Pharmacy Ownership On-Demand

0207-0000-25-703-H04-P

0207-0000-25-703-H04-T

Activity Type: Knowledge-Based

11 contact hours (1.1 CEU)

Pharmacists and Pharmacy Technician Learning Objectives

Upon completion of this activity, participants will be able to:

1. Review necessary components of a business plan.
2. Outline strategies for creating a realistic business plan.
3. List common reasons that cause a business plan to fail and/or not be funded.
4. Review how corporate structure can influence pharmacy operations.
5. Compare and contrast asset and common stock purchases.
6. Summarize tax implications and strategic elections in pharmacy transactions.
7. Describe the importance of financial due diligence.
8. Review key financial documents & metrics.
9. Summarize strategies for developing a systematic approach to financial analysis.
10. Discuss strategies for assessing a space or buildings size to ensure it meets the business' needs.
11. Review how signage, parking, local businesses, schools and communities can influence potential business at your pharmacy.
12. Describe attributes of a well laid out pharmacy retail floor plan.
13. Review strategies for creating an inviting store layout that encourages customer browsing.
14. Describe the components necessary to execute a successful marketing campaign.
15. Review the importance of crafting a unique and compelling marketing message that can be applied to all media platforms.
16. Compare and contrast various marketing methods including social media, direct mail, word of mouth, exterior signage, print, and broadcast media.
17. List key information to include on a company's website.
18. Describe why mobile-friendly websites are essential for today's consumer.
19. Discuss how different customer demographics interact with social media platforms in unique ways.
20. Review best practices for a optimizing your digital footprint and establishing a strong presence with social media.
21. Describe how data can be utilized to inform marketing decisions.
22. Discuss how demographics affect your OTC and niche options.
23. Review best practices for merchandising OTC products.
24. Summarize strategies for incorporating private label products into your OTC offerings.
25. Review various compliance requirements for pharmacies.
26. Outline the three areas of HIPAA compliance.
27. Review the DSCSA compliance deadlines.
28. Review federal and state laws governing pharmacies.
29. Describe ways that a pharmacy can work with physicians and other referral sources.
30. Outline steps for ensuring a successful acquisition of a pharmacy.
31. Review key components of a balance sheet and profit & loss statement.
32. Summarize fundamental accounting best practices.



NCPA is accredited by the Accreditation Council for Pharmacy Education as a provider of continuing pharmacy education. This program will provide 11 contact hours (1.1 CEUs) of continuing pharmacy education credit. The participant will need to attend all required components of the CE activity and complete a pre-test, pass a final assessment with a score of 70% or more, and complete a feedback survey to receive credit for the program. Target audience: community pharmacists and community pharmacy technicians.

Part 2: Pharmacy Ownership Live

Saturday, July 11 (9:30 a.m. – 6:30 p.m. ET) | Sunday, July 12 (8 a.m. – 4:30 p.m. ET)

0207-0000-26-704-L04-P

0207-0000-26-704-L04-T

Activity Type: Application-Based

10.5 contact hours (1.05 CEUs)

Pharmacists and Pharmacy Technician Learning Objectives:

1. Describe attributes of an entrepreneur in pharmacy.
2. Identify opportunities for business growth as an independent pharmacist.
3. Discuss various pathways to pharmacy ownership.
4. Explain the different types of financing available to pharmacies.
5. Discuss borrower eligibility for SBA loans.
6. Describe the SBA loan process from application to funding.
7. Describe cash flow of the business including a review of its impact on valuations.
8. Outline attributes that cause concern in a lease or buy proposal.
9. Discuss potential resolutions for lease problems and appropriate action.
10. Review key financial documents, metrics, and systematic approaches to evaluating business performance.
11. Interpret a balance sheet and profit & loss statements including their impact on operations and decision-making.
12. Compare and contrast transaction types and their associated financial and tax implications.
13. Outline how to incorporate demographic information in your business plan.
14. Explain the importance of researching demographics and what information you need to obtain in that research.
15. Describe how to determine an equitable selling/purchase price for a community pharmacy.
16. Outline which factors will affect the price of the pharmacy.
17. Describe cash flow of the business including a review of its impact on valuations.
18. Identify pharmacist and non-pharmacist roles to consider as part of your pharmacy team.
19. Discuss strategies for distributing responsibilities amongst a team to play to the strengths of each individual.
20. Discuss the importance of establishing a medication synchronization system for dispensing on workflow optimization.
21. Review services that pharmacies can offer to diversify revenue streams.
22. Summarize workflow considerations when implementing a new service.
23. Develop an action plan for implementing a new pharmacy service.
24. Describe the licensure requirements to open or transfer a pharmacy.
25. Explain the details of local, state and federal agencies that must be dealt with to transition a pharmacy acquisition.
26. Explain the implications of third-party payer contracts that can impact on the acquisition of a pharmacy.
27. Summarize best practices for marketing pharmacy services to patients.
28. Create a marketing plan to promote a new pharmacy service.
29. Discuss the impact of signage, parking and local business, schools and communities.
30. Identify key features of a store layout.
31. Describe how layout affects traffic flow.
32. Discuss the impact on profitability of a poorly designed layout.

Day 1 – Saturday, July 11, 2026

9:00-9:30 a.m.	Registration (Non-CE)
9:30-10:00 a.m.	Road to Pharmacy Ownership (Non-CE)
10:00-11:00 a.m.	Technology to Advance Your Business and Improve Your Workflow (Non-CE)
11:00-11:15 a.m.	BREAK (Non-CE)
11:15 a.m.-12:00 p.m.	Industry Showcase (Non-CE)
12:00-1:30 p.m.	Lunch and Meet and Greet with Exhibitors (Non-CE)
1:30-2:00 p.m.	Road to Pharmacy Ownership
2:00-2:45 p.m.	The How To's of Financing Your Pharmacy Deal
2:45-3:30 p.m.	Deal or No Deal
3:30-3:45 p.m.	BREAK (Non-CE)
3:45-4:30 p.m.	A Case Study on Financial Due Diligence for Pharmacy Owners
4:30-5:30 p.m.	Planning Your Next Step! A look at building, leasing and remodeling
5:30-6:30 p.m.	Networking Reception (Non-CE)

Day 2 – Sunday, July 12, 2026

7:15-8:00 a.m.	Continental Breakfast (Non-CE)
8:00-8:30 a.m.	Demographics
8:30-9:15 a.m.	Community Pharmacy Valuation
9:15-9:45 a.m.	Road to Pharmacy Ownership – A Different Perspective
9:45-10:00 a.m.	BREAK (Non-CE)
10:00-10:30 a.m.	Building Your Pharmacy Team
10:30 a.m.-Noon	Exploring and Implementing Diverse Revenue Opportunities
Noon-1:30 p.m.	Lunch & Meet and Greet with Exhibitors (Non-CE)
1:30-2:00 p.m.	Marketing Musts for Promoting Pharmacy Services
2:00-3:00 p.m.	Acquisition Target and Opening Timeline
3:00-3:45 p.m.	First and Last Impressions
3:45-4:30 p.m.	Ask the Experts Panel

Speakers

Basil Maqbool, PharmD, Vice President RxOwnership, West Region.

Bobby Glaze, Pharm.D., Loan Officer, First Financial Bank

Bonnie Bond, CPA, Sykes & Company, P.A.

Emlah Tubuo, PharmD, owner Powell Pharmacy

Gabe Trahan, Former Senior Director, Store Operations and Marketing, NCPA

Hashim Zaibak, PharmD, Hayat Pharmacy

John L. Watkins, MBA, Director of Sales, PRS Pharmacy Services

Jonathan G. Marquess, PharmD, CDCES, FAPhA, President/CEO The Marquess Group

Ollin Sykes, CPA, CITP, CMA, President, Sykes & Company, P.A.

Scott Weaver, Vice President of Pharmacy, PRS Pharmacy Services

Shahida Choudhry, PharmD, Owner, Palms Pharmacy



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