

Owner's Preliminary Checklist



Owner's Preliminary Checklist of Items Needed in Establishing Practice Value or Placing Practice for Sale

- Personal and Corporate (if applicable) Tax Returns for last three years
- Copy of Office Lease
- Staff Census – name of employee; hire date; current wages and benefits
- Monthly Production & Collection figures for the practice for the past 24 months
- Copies of Business Bank Statements for the prior 24 months
- Accounts Receivable Aging Report

Should you have any questions on this or other materials, please feel to contact your professional practice broker – Practice Sales & Appraisals - (818) 999-9595.