

2026 Clinic Sale Readiness Checklist

The difference between a market-ready practice and one that leaves money on the table is preparation. Work through the items below before you go to market — every box you can check is value defended in the negotiation.

01 Financial Normalization

- Three years of clean, reconciled financial statements (accrual basis).
- Owner add-backs documented: salary, personal expenses, one-time costs.
- Production and collection reports by provider and procedure.
- Accounts receivable aging and write-off policy clearly recorded.
- Equipment, leasehold, and asset register with depreciation schedule.

02 Regulatory & Compliance

- PIPA / privacy compliance and patient-records handling reviewed.
- Professional licences, registrations, and inspections all current.
- Lease terms, assignability, and renewal options confirmed in writing.
- Employment agreements, contractor status, and WCB coverage in order.
- Outstanding liabilities, liens, and disputes disclosed and resolved.

03 Operational Readiness

- Documented systems, protocols, and standard operating procedures.
- Modern practice-management software / EMR with exportable data.
- Active patient base and recall metrics (12–24 month retention).
- Key-staff retention plan; reduced dependence on the principal owner.
- Hygiene, specialty, and referral revenue streams clearly separated.

04 Positioning & Narrative

- A clear growth story: untapped capacity, services, or demographics.
- Defined buyer profile — DSO, private equity, or associate transition.
- Confidential information memorandum prepared, not a generic listing.
- Realistic valuation range grounded in normalized earnings, not rules of thumb.
- Succession / mentorship plan that protects patient goodwill.

Ready to find out what your practice is really worth?

Request a confidential, obligation-free preliminary valuation. Every enquiry is treated in strict confidence.