ADS DENTAL TRANSITIONS™

VALUATIONS | SALES | CONSULTING

# PRACTICE VALUATION APPLICATION

**ADS South, LLC**
120 Istoria Drive
St. Augustine, FL 32095

770-664-1982
Fax: 678-965-1812
info@adssouth.com
www.adssouth.com

*All ADS companies are independently owned and operated*

# Owner Personal Information - Please fill in completely and legibly

First Name _____ Middle Name _____ Last Name _____

Degree DDS _____ DMD _____ Other _____ Date of Birth _____ Spouse's Name _____

Practice Trade Name _____

GP or Specialty _____ If incorporated, are you a "C" or an "S" Corporation? C _____ S _____

Corporation Suffix: PC _____ PA _____ APDC _____ LLC _____ LLP _____ Other _____

Name of President / Manager _____ Secretary _____

Name any other officers and all shareholders by percent interest _____

_____

Do you own or practice in another practice? List addresses _____

_____

Reason for Appraisal _____ Date of Preparation _____

Practice Street Address _____

City _____County/Parish_____ State _____ Zip _____

Practice Phone Number _____ Fax Number _____ May we fax to this number? _____

E-mail Address _____ Can we send private e-mail to you? _____

Website _____

Cell Phone Number _____ Home Phone Number _____

Home Street Address _____

City _____ State _____ Zip _____

Accountant _____Phone _____ E-Mail _____

Attorney _____Phone _____ E-Mail _____

Leasing Agent _____Phone _____ E-Mail _____

How did you hear about ADS South, LLC? _____

# List of Required Items

_____ **Last three years** of your **complete** **Schedule C** from personal tax return **with Statement of Other Expenses**, ***OR*** **complete** **Schedule 1065,** ***OR*** **complete** **Schedule 1120,** ***OR*** **complete** **Schedule 1120S,** whichever you have filed.

_____ Latest Year-to-date profit and loss statement for the current year.

_____ Individual Profit and Loss reports for each month for 2019 and 2020. If unavailable, software Production & Collection reports

_____ Latest year's W-2 forms for employees with employee's position written on each W-2.

The following reports from your practice management software, as available

_____ Aged Accounts Receivable Report (provide only the last one page summary)

_____ Production by Provider report for last year and current year to date, as available

_____ Production by Category report for last year and current year to date, as available

_____ Production and Collection Summary Report

_____ Report of patients by age

_____ Report of patients by zip code or town

_____ **Copy of contracts with any associates, partners, or employees**

_____ A copy of your office lease.

_____ A copy of any equipment appraisal report

_____ Copies of any equipment leases and list of any leased equipment

_____ Copy of your current fee schedule and fee schedule for any plans

_____ List of loans against practice and payoff balances

_____ Photographs of all rooms and exterior of office. (jpeg or pdf form)

_____ A diagram of the office layout -- may be hand drawn.

_____ Complete list of all major items to be included in the sale and date of acquisition of major items. (Use list on last pages)

_____ List trade names and addresses of any other practices that you own and any shared employee positions

_____ Valuation/Analysis fee of $2,950 for GP or $3,500 for specialty. Fee is discounted to $1,000 if executed Sales Consulting Agreement is sent with appraisal information). Call for fees for divorce valuations or valuations involving testimony.

_____ Your urgency in selling practice. ("10" represents selling in 30 days. "1" represents selling in 2 years.)

# Personal Data

Dental School Alma Mater _____ Year Graduated _____

Year Beginning Practice in City _____ Year Beginning Practice in Current Location _____

Right or Left Handed _____ Purchase or Scratch Start _____

From whom was practice purchased_____ What Year _____

Gross Income of practice when purchased $_____ Purchase price of practice $_____

Professional Organizations _____

Post Graduate Degree _____ Alma Mater_____

Date Completed _____ Specialty or Designations _____

Board Qualified? _____ Board Certified _____ States Licensed: _____

Do you have an associate? _____ Do you have a partner? _____

Do you share space? _____ Is there an assignable written agreement? _____

Is there a buy-out agreement? _____ Is there an assignable restrictive covenant? _____

What are the terms of the covenant _____

What are the terms of the buy-out agreement _____

Has an associate or partner left your practice in the last two years? _____ When?_____

# Office Data

Office Sq. Footage _____ Expandable Footage _____

Current Monthly Rental Amount $_____ Is Office Handicapped Accessible? _____

Number of Parking Spaces _____ Proximity of Parking _____

Total Number of Equipped Operatories _____ Number of Plumbed But Unequipped Operatories _____

Number of Operatories used primarily by dentists _____ Number of Operatories used primarily by hygienists _____

Number of Unplumbed and Empty Operatories _____ Do you or your entity own your building? _____

Do you want to sell the building? _____ Legal Name of Owner _____

Was building appraised? _____ When? _____ Appraised Price $_____

If not appraised, estimated price $_____ If Not for Sale, Monthly Rental Amount $ _____

Annual Property Taxes $_____ Annual Property Insurance $_____

If you do not own your office, what is the Date of Lease _____ Date Lease Ends _____

Describe any renewal options _____Option to Purchase? _____

# Post-Sale Information

Plans after the sale of your Practice _____

**Days/Week Currently Worked:** _____ **Enter number of days/week you would like to work for the buyer after the sale**

Desired Work Days/Week 1st Year _____ Desired Work Days/Week 2nd Year _____ Desired Work Days/Week 3rd Year _____

Desired Work Days/Week 4th Year _____ Desired Work Days/Week 5th Year _____ Desired Work Days/Week 6th Year _____

# Practice Data

**Date Closed due to Covid** _____ **Date reopened for Covid** _____

Has your practice been appraised before? _____ When? _____ By Whom? _____

Previous Appraisal Price $_____ Have you previously tried to sell your practice? _____ When? _____

Did you use a broker? _____ Who? _____ Is your practice currently listed with another broker? _____

Who: _____ Have you used a management consultant in the past five years? _____ Who? _____

Results _____

Describe internal marketing _____

External marketing _____

Do you own any other practices? List addresses_____

_____

Practice in any other office? Explain _____

Has your practice gross changed significantly? _____ Why: _____

_____

Do you provide Nitrous Oxide? _____ Conscious Sedation or DOCS? _____ IV Sedation? _____ Mercury free? _____

How many <u>different</u> patients were treated in last 18 months) _____ Average number of new patients per month _____

Average number of patients treated per day by dentist _____by hygienist _____

How far ahead is owner scheduled? _____ Hygienist? _____

% Practice Income from Cash _____% % of Patients Paying Cash _____%

% Practice Income from Insurance _____% % of Patients with Insurance _____%

% Practice Income from Capitation _____% % of Patients with Capitation _____%

% Practice Income from Medicaid _____% % of Patients with Medicaid _____%

# Scheduling Data

Monday _____ Tuesday _____ Wednesday _____

Thursday _____ Friday _____ Saturday _____

Owner Hours Worked/Week _____ Associate Hours Worked/Week _____

Hygiene Hours Worked/Week _____ Dentist Patient Visits Per Year _____

Hygiene Patient Visits Per Year _____ Number of Days Worked Per Year _____

Number of Weeks Worked Per Year _____ What is Your Collection Percentage? _____

Actual Accounts Receivable Balance $_____ What is the Patient Credit Balance? $_____

Accounts Receivable: Current $_____ 30 days $_____ 60 days $_____ 90 days$_____ >90 days $_____

What Type Recall System? _____ What Type Practice Management Software? _____

# Production by Service

Hygiene _____% Operative _____% Pedodontics _____% Orthodontics _____% Implants _____%

Removable Prosthetics _____% Fixed Prosthetics _____% Endodontics _____% Periodontics _____%

Oral Surgery _____% Cosmetic _____% TMJ Treatment _____% Soft Tissue Management _____% Other _____%

**TOTAL** (should be 100%) _____% What is referred out? _____

**Is any of your reported income from any other source than patient treatment from this practice?_____ If so, how much for each year?**

**$_____ in 20___ $_____ in 20___ $_____ in 20___**

What is the source of the other income? _____

# Fee Schedule

Adult Prophy 01110 $_____

Panoramic X-Ray 00330 $_____

Two Surface Anterior Composite 02331 $_____

Two Surface Posterior Composite 02386 $_____

Core Build-Up Including Pins 02950 $_____

Crown – Porcelain/Ceramic 06740 $_____

Crown - Gold/Porcelain 02750 $_____

Labial Porcelain Veneer 02962 $_____

Anterior Root Canal 03310 $_____

Bicuspid Root Canal 03320 $_____

## Demographic Data

What is the approximate population of your city or town? _____ Of your drawing area? _____

Major employers in the area _____

_____

Describe any major economic changes in your drawing area _____

_____

## Staff Data

| | | | REQUIRED | OPTIONAL | |
|---|---|---|---|---|---|
| **Position** | **Date Hired** | **Stay?** | ***Annual* Salary** | ***Hourly* Salary** | **Annual Cost of Benefits** |
| Office Manager | _____ | _____ | $_____ | $_____ | $_____ |
| Receptionist | _____ | _____ | $_____ | $_____ | $_____ |
| Insurance Manager | _____ | _____ | $_____ | $_____ | $_____ |
| Other Front Desk | _____ | _____ | $_____ | $_____ | $_____ |
| Bookkeeper | _____ | _____ | $_____ | $_____ | $_____ |
| Assistant | _____ | _____ | $_____ | $_____ | $_____ |
| Assistant | _____ | _____ | $_____ | $_____ | $_____ |
| Assistant | _____ | _____ | $_____ | $_____ | $_____ |
| Assistant | _____ | _____ | $_____ | $_____ | $_____ |
| Assistant | _____ | _____ | $_____ | $_____ | $_____ |
| Hygienist | _____ | _____ | $_____ | $_____or _____% | $_____ |
| Hygienist | _____ | _____ | $_____ | $_____or _____% | $_____ |
| Hygienist | _____ | _____ | $_____ | $_____or _____% | $_____ |
| Hygienist | _____ | _____ | $_____ | $_____or _____% | $_____ |
| Lab Technician | _____ | _____ | $_____ | $_____ | $_____ |
| Lab Technician | _____ | _____ | $_____ | $_____ | $_____ |
| Associate | _____ | _____ | $_____ | $_____or _____% | $_____ |
| Associate | _____ | _____ | $_____ | $_____or _____% | $_____ |
| Associate | _____ | _____ | $_____ | $_____or _____% | $_____ |
| Other _____ | _____ | _____ | $_____ | $_____ | $_____ |

What Benefits do you provide for the staff ?_____

_____

Do you hire any unpaid family members? _____ What position do they hold and what is the estimated fair market value of their job?

_____

Are there any family or other employees who are paid more/less than the normal salary for their position? _____

Which positions and amount of over/under compensation for each? _____

_____

## Collection Centers

| | Current Year to Date | Last Year | Two Years Ago |
|---|---|---|---|
| Year | 1/1/201___ to _____/_____/201___ | 201__ | 201___ |
| Gross Collections | $_____ | $_____ | $_____ |
| Owner | $ _____ | $_____ | $_____ |
| Hygienists | $_____ | $_____ | $_____ |
| Associate | $_____ | $_____ | $_____ |
| Associate | $_____ | $_____ | $_____ |
| Associate | $_____ | $_____ | $_____ |

How is associate compensated? Amount? $_____per year or _____% of collections or production

How is hygienist compensated? Amount? $_____per year or _____% of collections or production

## Practice Conformity Data

Does practice meet OSHA standards? _____ If not, why not? _____

_____

Does practice conform with HIPAA requirements? _____ Why not? _____

_____

Do you forgive any insurance copayments? _____ Explain and how much _____

_____

Have you received any disciplinary actions in the past seven years? _____ Explain_____

_____

_____

Have you had any practice-related lawsuits filed against you in the past ten years? _____

Explain _____

_____

Are there any health problems which would affect your practice of dentistry? _____Explain_____

_____

Describe your practice, staff, patients, community and practice philosophy _____

_____

_____

_____

_____

Describe anything that would be considered a negative about your practice _____

_____

_____

## Covid Information

- Date closed for Covid _____ Date reopened _____
- Did Covid reduce your operational capacity when you reopened? By what percent compared to 2019? _____%
- How does your schedule compare to same period in 2019?_____
- Do you have adequate PPE inventory? _____ Do you pass the cost of PPE on the patients?_____
- How does your post Covid treatment mix compare to same period of 2019?_____
- How has the insured patent / cash patient ratio changed since reopening?_____
- Have all staff members returned or been replaced since reopening? _____ Your estimated monthly salary expense $_____
- Did you receive a PPP loan? _____ How much? $_____ When received? _____
- Was this loan paid back or forgiven? _____ Was this loan amount included in your P&L or tax return? _____
- Did you receive a EIDL loan? _____ How much? $_____ When received? _____
- Was this loan paid back or forgiven? _____ Was this loan amount included in your P&L or tax return? _____

## Insurance Explanation

Total expense for Insurance $_____ How much of total is for owner health insurance? $_____

How much of total is for staff health insurance? $_____ How much of total is for owner life insurance? $_____

How much of insurance is for owner personal benefits, i.e. disability? $_____

How much of total is for malpractice? $_____ How much of total is for building insurance? $_____

## Taxes and Licenses Explanation

Total expense for taxes $_____ How much of total is for payroll taxes? $_____

How much of total is for staff payroll tax? $_____ How much of total is for owner payroll tax? $_____

How much of total is for ad valorem / property taxes? $_____ How much of total is for real estate taxes? $_____

## Pension Explanation

Total expense for pension plan $_____ How much of total is for staff? $_____

How much of total is for owner? $_____

## Benefits Explanation

Total expense for employee benefits $_____ How much of total is for staff? $_____

How much of total is for owner? $_____

## Insurance Plans

| Plan | % of pts. on plan | % of your fee paid by plan | Plan | % of pts. on plan | % of your fee paid by plan |
|---|---|---|---|---|---|
| _____ | _____% | _____% | _____ | _____ | _____% |
| _____ | _____% | _____% | _____ | _____ | _____% |
| _____ | _____% | _____% | _____ | _____ | _____% |
| _____ | _____% | _____% | _____ | _____ | _____% |
| _____ | _____% | _____% | _____ | _____ | _____% |
| _____ | _____% | _____% | _____ | _____ | _____% |
| _____ | _____% | _____% | _____ | _____ | _____% |
| _____ | _____% | _____% | _____ | _____ | _____% |
| _____ | _____% | _____% | _____ | _____ | _____% |
| _____ | _____% | _____% | _____ | _____ | _____% |

# Specialty Practice Supplement for Orthodontic Practices

Total number of patients in treatment: Adult_____ Child_____ Complete banding treatment patients: Adult _____Child_____

Partial banding treatment patients: Adult _____Child _____ Number of patients in partial treatment: Adult _____ Child _____

Patients in retention: Adult _____Child _____ Patients in TMJ treatment _____

Current contracts balance _____ Accounts receivable balance (money past due) $_____

Number of patients in treatment no longer paying fees _____ Attach a detailed list of patients and stage of treatment for each

New starts this year as of Jan. 1, 20____ _____ New starts in last twelve (12) months _____

Cost of average full treatment: Child $_____ Adult $_____

Average down payment for records $_____ Banding $_____

Average fee per visit $_____ Average fee per retention patient: Initial $_____ Periodic $_____

Average fee for partial treatment:: Adult $_____ Child $_____

Average fee for TMJ treatment: $_____

Do you use: Begg _____% Edgewise _____% Invisalign _____% Other - _____ _____%

Describe technique, banding, etc. most commonly used: _____

_____

What percent of your patients are from dentist referrals? _____%

Describe your referral base:_____

_____

_____

Explain the best strengths and worst weaknesses of your practice::_____

_____

_____

_____

_____

## Specialty Practice Supplement for Oral Surgery Practices

What percent of practice is: Exodontia _____% Maxillofacial _____% TMJ _____% Cosmetic _____%

Trauma _____% Other _____% Describe _____

Describe typical anesthesia technique for in-office surgery: _____

_____

At what hospitals do you have privileges? _____

Have you lost privileges at any hospital? _____ Which ones? _____

_____

What percent of your patients are from dentist referrals? _____%

Describe your referral sources (number, ages, etc.) _____

_____

Explain the best strengths and worst weaknesses of your practice _____

## Specialty Practice Supplement for Periodontal Practices

What percent of practice income is: Implants _____% Surgical _____% Non-Surgical _____% Recall _____%

Other _____% Describe _____

Describe anesthesia techniques used: _____

_____

What percent of your patients are from dentist referrals? _____%

Do you use a laser? _____ What brand? _____ Do you have a cone beam X-Ray? Brand? _____

Describe implant treatment – brands, etc. _____

_____

Describe your referral base: _____

Explain the best strengths and worst weaknesses of your practice

_____

_____

# Equipment List

### Reception

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Waiting Room Chairs |
| ____ | _____ | _____ | Waiting Room Tables |
| ____ | _____ | _____ | Waiting Room Lamps |
| ____ | _____ | _____ | Pictures/Decorations |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

### Private Office

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Desk |
| ____ | _____ | _____ | Chair |
| ____ | _____ | _____ | Bookcase |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

### Business Office

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Business Office Desk |
| ____ | _____ | _____ | Business Office Chair |
| ____ | _____ | _____ | Copy Machine |
| ____ | _____ | _____ | File Cabinets |
| ____ | _____ | _____ | Typewriter |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Printer |
| ____ | _____ | _____ | Software |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

### Lounge

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Refrigerator |
| ____ | _____ | _____ | Table & Chairs |
| ____ | _____ | _____ | Microwave |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

### Mechanical

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Compressor |
| ____ | _____ | _____ | Vacuum Pump |
| ____ | _____ | _____ | Air Dryer |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**X-Ray Equipment**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Panorex X-Ray |
| ____ | _____ | _____ | Cone Beam X-Ray |
| ____ | _____ | _____ | Film Processor |
| ____ | _____ | _____ | Developing Tank |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

Are X-Ray units Digital? _____

**Tanks**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Nitrous System |
| ____ | _____ | _____ | Tank Valves |
| ____ | _____ | _____ | Air Dryer |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Lab**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Model Trimmer |
| ____ | _____ | _____ | Lathe |
| ____ | _____ | _____ | Furnace |
| ____ | _____ | _____ | Splash Hood / Shield |
| ____ | _____ | _____ | Vibrator |
| ____ | _____ | _____ | Casting Machine |
| ____ | _____ | _____ | Suck Down Unit |
| ____ | _____ | _____ | Articulators |
| ____ | _____ | _____ | Surveyor |
| ____ | _____ | _____ | Plaster Bins |

**Lab cont'd.**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Vacuum Mixer |
| ____ | _____ | _____ | Lab Handpieces |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Sterilization**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Autoclave |
| ____ | _____ | _____ | Ultrasonic Cleaner |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Hygiene #1**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Light |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | Cavitron |
| ____ | _____ | _____ | High Speed HP |
| ____ | _____ | _____ | Low Speed HP |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |

**Hygiene #2**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Light |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | Cavitron |
| ____ | _____ | _____ | High Speed HP |
| ____ | _____ | _____ | Low Speed HP |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Hygiene #3**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Light |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | Cavitron |
| ____ | _____ | _____ | High Speed HP |
| ____ | _____ | _____ | Low Speed HP |
| ____ | _____ | _____ | Curing Light |

**Hygiene #3 cont'd.**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Hygiene #4**

| Quantity Acquired | Description | |
|---|---|---|
| ____ | _____ | _____ Patient Chair |
| ____ | _____ | _____ Dental Units |
| ____ | _____ | _____ Doctor's Stool |
| ____ | _____ | _____ Assistant's Stool |
| ____ | _____ | _____ Light |
| ____ | _____ | _____ Mobile Carts |
| ____ | _____ | _____ Prophy Jet |
| ____ | _____ | _____ Cavitron |
| ____ | _____ | _____ High Speed HP |
| ____ | _____ | _____ Low Speed HP |
| ____ | _____ | _____ Curing Light |
| ____ | _____ | _____ X-Ray Units |
| ____ | _____ | _____ Computer |
| ____ | _____ | _____ _____ |
| ____ | _____ | _____ _____ |

**Operatory #1**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |

**Operatory #1 cont'd.**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Lights |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | HS HP's |
| ____ | _____ | _____ | SS HP's |
| ____ | _____ | _____ | Electric HP's |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |
| ____ | _____ | _____ | Amalgamator |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Operatory #2**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Lights |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | HS HP's |
| ____ | _____ | _____ | SS HP's |
| ____ | _____ | _____ | Electric HP's |
| ____ | _____ | _____ | Curing Light |

**Operatory #2 cont'd.**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |
| ____ | _____ | _____ | Amalgamator |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Operatory #3**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Lights |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | HS HP's |
| ____ | _____ | _____ | SS HP's |
| ____ | _____ | _____ | Electric HP's |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |
| ____ | _____ | _____ | Amalgamator |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Operatory #4**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Lights |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | HS HP's |
| ____ | _____ | _____ | SS HP's |
| ____ | _____ | _____ | Electric HP's |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |
| ____ | _____ | _____ | Amalgamator |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Operatory #5**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Lights |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |

**Operatory #5 cont'd.**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | HS HP's |
| ____ | _____ | _____ | SS HP's |
| ____ | _____ | _____ | Electric HP's |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |
| ____ | _____ | _____ | Amalgamator |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Operatory #6**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Lights |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | HS HP's |
| ____ | _____ | _____ | SS HP's |
| ____ | _____ | _____ | Electric HP's |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |

**Operatory #6 cont'd.**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Amalgamator |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Operatory #7**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Lights |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | HS HP's |
| ____ | _____ | _____ | SS HP's |
| ____ | _____ | _____ | Electric HP's |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |
| ____ | _____ | _____ | Amalgamator |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Operatory #8**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Lights |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | HS HP's |
| ____ | _____ | _____ | SS HP's |
| ____ | _____ | _____ | Electric HP's |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |
| ____ | _____ | _____ | Amalgamator |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Operatory #9**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Lights |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | HS HP's |
| ____ | _____ | _____ | SS HP's |
| ____ | _____ | _____ | Electric HP's |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |
| ____ | _____ | _____ | Amalgamator |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Operatory #10**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Lights |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |

**Operatory #10 cont'd.**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | HS HP's |
| ____ | _____ | _____ | SS HP's |
| ____ | _____ | _____ | Electric HP's |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |
| ____ | _____ | _____ | Amalgamator |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Operatory #11**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Lights |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | HS HP's |
| ____ | _____ | _____ | SS HP's |
| ____ | _____ | _____ | Electric HP's |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |

**Operatory #11 cont'd.**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Amalgamator |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Operatory #12**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Lights |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | HS HP's |
| ____ | _____ | _____ | SS HP's |
| ____ | _____ | _____ | Electric HP's |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |
| ____ | _____ | _____ | Amalgamator |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

**Operatory #13**

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Patient Chair |
| ____ | _____ | _____ | Dental Units |
| ____ | _____ | _____ | Doctor's Stool |
| ____ | _____ | _____ | Assistant's Stool |
| ____ | _____ | _____ | Lights |
| ____ | _____ | _____ | Mobile Carts |
| ____ | _____ | _____ | Prophy Jet |
| ____ | _____ | _____ | HS HP's |
| ____ | _____ | _____ | SS HP's |
| ____ | _____ | _____ | Electric HP's |
| ____ | _____ | _____ | Curing Light |
| ____ | _____ | _____ | X-Ray Units |
| ____ | _____ | _____ | Computer |
| ____ | _____ | _____ | Nitrous Meter |
| ____ | _____ | _____ | Amalgamator |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

Are computers networked? _____

Is all equipment in working condition? _____

If not, describe exceptions: _____

_____

_____

_____

_____

List any other equipment to be included

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | Cerec/CAD/CAM |
| ____ | _____ | _____ | Zoom |
| ____ | _____ | _____ | Laser |
| ____ | _____ | _____ | Laser |
| ____ | _____ | _____ | Intraoral Camera |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

Other

Is any equipment shared with another owner? _____

Please list: _____

_____

_____

Is all equipment in working condition? _____

If not, describe exceptions: _____

_____

_____

_____

_____

List any items **not** to be included:

| # | Year Acquired | Manufacturer | |
|---|---|---|---|
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |
| ____ | _____ | _____ | _____ |

Will you leave at least a one month inventory of supplies? _____

Describe any defects in your practice or building that could affect its value or performance _____

_____

_____

_____

_____

_____

_____

Do you warrant your treatment? _____

Describe warranty _____

_____

I attest that all of the information that I have provided to The Transitions Group is true to the best of my knowledge and that there are no omissions of any information that would materially alter the value, desirability, or performance of my practice.

Signature:_____

Date: _____

# Office Layout

Please provide diagram of office layout (may be hand drawn).