

Key Issues in Valuing your Practice

CLIENTS

Age	1	2	3	4	5	6	7	8	9	10
Demographics	1	2	3	4	5	6	7	8	9	10
How Long have they been clients	1	2	3	4	5	6	7	8	9	10
Potential Opportunities	1	2	3	4	5	6	7	8	9	10

SYSTEMS

Quality of Records	1	2	3	4	5	6	7	8	9	10
Up to Date computer hardware And software systems	1	2	3	4	5	6	7	8	9	10
Quality Staff with experience	1	2	3	4	5	6	7	8	9	10
Signed appointments from clients	1	2	3	4	5	6	7	8	9	10
Risk assessments	1	2	3	4	5	6	7	8	9	10
Frequency of contact	1	2	3	4	5	6	7	8	9	10
Quality of loyalty systems ie newsletters, phone contacts regular face to face meetings	1	2	3	4	5	6	7	8	9	10

FINANCIAL

Quality of records including profit and loss and balance sheets	1	2	3	4	5	6	7	8	9	10
Details of terms obtained from product providers	1	2	3	4	5	6	7	8	9	10
Costs involved in the business such as staff, rentals etc	1	2	3	4	5	6	7	8	9	10
EBIT, available to the buyer for servicing a loan on purchase	1	2	3	4	5	6	7	8	9	10

REPUTATION

Amount of Time as an adviser	1	2	3	4	5	6	7	8	9	10
General reputation in your community (eg Rotary, regular speaker, community leader)	1	2	3	4	5	6	7	8	9	10

RESTRAINT OFFERED

Are you likely to sell all of the business and be totally restrained or is this likely to be a down sizing which would require restraints for the individual clients being sold	1	2	3	4	5	6	7	8	9	10
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TERMS AND CONDITIONS OF THE SALE

How paid and what period of time for completion	1	2	3	4	5	6	7	8	9	10
Rise and Fall clauses	1	2	3	4	5	6	7	8	9	10

REASONS FOR SALE

Retirement	1	2	3	4	5	6	7	8	9	10
Consolidation	1	2	3	4	5	6	7	8	9	10
New Direction	1	2	3	4	5	6	7	8	9	10