

## The Dental Practice Sale: How to Stick the Landing



**Selling a practice is a significant decision. Missteps in the process can lead to delays, poor financial outcomes, excessive taxes, legal troubles, and even psychological distress.**

The process of selling a dental practice is complex and can feel daunting. From understanding how to position the practice to attract buyers, to implementing the factors that drive the practice valuation higher, to recognizing when you need a practice broker, knowing how to navigate the sales process is crucial.

Wes Read, CPA, CFP® shares a proven, step-by-step process in this high energy, deep-dive presentation. Attendees will learn how to assess if it's the best time for them to sell. They will understand how to calculate and maximize practice resale value. Attendees will evaluate the advantages and disadvantages of working with a broker, as well as those of selling to an institutional buyer (DSO/DPO.) They will better understand how much of the sale proceeds will go to taxes. Ultimately, attendees will learn how to develop a well-structured plan to navigate their sale and stage themselves for a successful transition out of the practice.



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### Learning Objectives:

- Determine if you're financially ready to retire or work less
- Discover what your practice is worth and how much you'll keep after debt, taxes, and selling costs
- Learn how to maximize the practice to prepare for a sale
- Learn the pros and cons of working with a broker
- Analyze the reasons to sell (or not to sell) to an institutional buyer
- Explore case studies highlighting common pitfalls and how to avoid them
- Understand how to interpret complex DPO proposals (optional course content below)

#### SUGGESTED AUDIENCE:

Dental Practice Sellers

#### SUGGESTED FORMAT:

Full or Partial Day;  
Lecture, Workshop, Keynote

#### OPTIONAL COURSE CONTENT:

### Emerging Dental Partnership Organizations (DPOs)

Learn about the growing trend in large group practices known as DPOs and how selling to a DPO differs from traditional practice sales.