



VETERINARY PRACTICE GROUP

Omni Practice Group
6513 132nd Ave NE, #200
Kirkland, WA 98033
877.268.0963
www.omni-pg.com

Required Practice Financial and Practice Documents

Checklist

Instructions: Please provide the following information/documents. Please check off items enclosed to the left of the item number or enter N/A if item is not available. Please return this form or a copy with your documents.

- _____ 1. Past 5 years tax returns. Schedule C's or 1120(s) if it is a Corporation, **All Supporting Statements**.
- _____ 2. Annual Profit & Loss and Balance Sheet: Year to Date, & past 5 years.
- _____ 3. Detailed Historical Depreciation Schedule listing yearly total of equipment/furnishings currently used. This is called the Asset Report and is part of your tax return. (May have to call your CPA to obtain)
- _____ 4. Inventory of MAJOR equipment – X-ray, Ultrasound, Laser etc.
- _____ 5. Current Accounts Receivable Aging Report.
- _____ 6. Production/Collections by Procedure and Product Sales report for past 3 years.
- _____ 7. Report showing Revenue/Production by Associate for past 3 years
- _____ 8. All Lease Agreements; Building, Equipment, etc.
- _____ 9. All Maintenance & Marketing Contracts; Computer, website, Yellow pages, etc.
- _____ 10. Copy of any Employment Agreements. (or description if verbal)
- _____ 11. Narrative of any major events that may have affected your practice in a positive or negative way in the past three years. For example, lawsuit, negative/positive publicity, Veterinarian of the year award, added a partner or associate, etc.

OPTIONAL ADDITIONAL INFORMATION:

- _____ 12. Copy of current Fee Schedule.
- _____ 13. Copy of Financial Policy.
- _____ 14. Personnel Policy and/or Personnel Handbook.
- _____ 15. List of Employee Benefits if not covered in Personnel Policy.
- _____ 16. Any additional information which would help the consultant value the practice fairly.

Other events or things we should be aware of:

_____, _____ initials



DOCTOR NAME: _____

PRACTICE NAME: _____

[illegible]