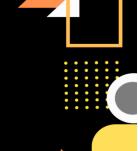


Nurse Practitioner Practice Valuation Checklist

Use this worksheet to start organizing the information you'll need when determining the value of your NP practice.

1. Financial Information ☐ Last 3 years of profit & loss statements ☐ Last 3 years of tax returns ☐ Current balance sheet ☐ Accounts receivable aging report ☐ Documentation of owner's compensation and benefits ☐ Adjustments for one-time or non-recurring expenses 2. Patient & Revenue Metrics ☐ Total annual revenue (by year) ☐ Annual EBITDA (earnings before interest, taxes, depreciation, amortization) ☐ Payer mix (Medicare, Medicaid, commercial, self-pay) ☐ Number of active patients (seen in past 18–24 months) ☐ Patient retention rate ☐ Average number of new patients per month 3. Operations & Staffing ☐ List of providers (NPs, physicians, other clinicians) ☐ Support staff roster (RNs, MAs, admin) ☐ Staff turnover rate \square Payroll and benefits costs ☐ Key employment contracts





4. Assets & Liabilities

☐ Medical equipment inventory (with estimated fair market value)
□ Office furniture, computers, and supplies
\square Lease or real estate details (if owned)
□ Outstanding loans or debts
☐ Leasehold improvements
5. Intangible Assets
□ Patient panel size and demographics
\square Referral networks and key partnerships
\square Insurance contracts and credentialing status
□ Online presence (website, reviews, social media)
\square Reputation and goodwill in the community
6. Regulatory & Compliance
\square State practice authority level (full, reduced, restricted)
☐ Licenses and certifications
\square Compliance with HIPAA and other healthcare regulations
☐ Malpractice insurance coverage

7. Next Steps

- Review financials and normalize earnings
- Decide on a valuation approach (income, market, asset-based)
- Consider engaging a healthcare valuation expert or CPA
- Use results for planning, partnerships, or sale negotiations

Tip for Clients: Even if you're not planning to sell right now, keeping this information organized will make your practice easier to manage and more valuable in the long run.