3-Year Exit Planning Roadmap for Physicians

Plan your medical practice exit with confidence. This visual guide outlines the essential actions to take in each phase

🔹 24–36 Months Out
Long-Term Planning

- Set retirement goals
- Get a formal valuation
- Clean financial records
- Assess lease/property terms
- Identify potential successors

🔸 12–24 Months Out
Market Readiness

- Engage a broker
- Draft CIM and blind profile
- Begin confidential outreach
- Prepare due diligence docs
- Review buyer pool fit

🟡 3–12 Months Out
Buyer Engagement

- Receive and negotiate LOIs
- Enter due diligence
- Work with legal/tax advisors
- Finalize Asset Purchase Agreement
- Plan staff/patient messaging

🟢 0–3 Months Out
Closing & Transition

- Close the transaction
- Transfer business operations
- Onboard buyer and staff
- Send patient letters
- Begin retirement or consulting