



Documentation requirements for Andy Tapper potential practice sale

1. Financial Statements for the years ending 31 March 2018, 2019 and 2020.
2. Management accounts or cash book (ideally by month) for period to 31 December 2020.
3. Breakdown of revenue by clinician by month for the years ended 31 March 2018, 2019 and 2020 and for each month for the period ended 31 December 2020.
4. Breakdown of revenue by service code for the same periods above.
5. New patient numbers for the same periods above.
6. Practice management system - please confirm you are on Exact.
7. Details of any accounting software that is used and any third-party software/resource that are used for any functions (i.e. payroll).
8. Schedule of all employees - their roles, hours and pay.
9. Details of current lease.
10. Latest fixed asset register and comment if any existing equipment needs replacing or new equipment is required in near term.

Please attach the above documentation to your email and send through to:
tony@lanz.dental or bruce@lanz.dental

Any questions please contact Tony on **021 866 985** or Bruce on **021 777 499**.