

# MAPPING EXERCISE FOR BUYER

Once you've completed this exercise, take these variables and overlay them against the practice you're considering purchasing. Look to see how closely that practice aligns with your definition of an ideal client. The closer the practice is to the ideal client, the likely better the ROI and the likely higher the multiple that you may be willing to spend. Use the tool below to assist you with this process.

Ideal client profile	Your practice	Prospective practice	Degree of alignment* (rate 1-3)
Client demographics			
Min. assets/revenues			
% Recurring revenue			
% Non-investment revenue			
Niche market(s)			
COIs/referrals			
Primary challenges/ concerns			

\*Use 1 – 3 scoring system based on level of alignment: 1 = below your practice, 2 = aligned with your practice, 3 = exceeds your practice