

Billing company sale readiness checklist

A few months of preparation can make a real difference to price and to how smoothly the handover goes.

Numbers

- ☐ Revenue by client for the last two to three years
- ☐ How long each client has been with you
- ☐ Your costs, separated from personal expenses
- ☐ Collection results by client, if you track them

Contracts and compliance

- ☐ Signed contract with every client
- ☐ Whether each contract can be assigned to a buyer
- ☐ Business associate agreements with every client and vendor
- ☐ Any disputes or audits written up

How the work gets done

- ☐ Written process for each client
- ☐ List of every system, login owner and how access transfers
- ☐ Notes on each client's payers and quirks

People and handover

- ☐ Who on your team is key, and whether they'd stay
- ☐ How long you're willing to help after the sale
- ☐ Plan for telling clients, after signing

General information, not billing, legal or tax advice. Rules vary by payer and state; check current guidance. Want a second pair of eyes? Free billing review: titraterevenue.com/contact.html · hello@titraterevenue.com