

# The Dental Transition

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## Leaving a Legacy in 2026: The Right Way to Say Goodbye to Your Patients

After dedicating years—even decades—to serving your community as a dentist, deciding to sell your dental practice is never just a business decision; it's personal. You've built trust, nurtured relationships, and created a professional legacy that deserves to be honored, even as you move on to the next chapter of your life.

A thoughtful, well-planned transition protects the value of your practice and ensures your patients and staff feel respected and supported. Here's how you, as the seller, can leave your practice while retaining your practice's dignity, appreciation, and lasting goodwill.

### 1. Prepare and Support Your Staff (one week prior to closing)

Your team plays a vital role in how patients experience the transition. In 2026, patients will expect transparency, continuity, and professionalism—and it all begins with your staff.

- **Communicate early and clearly** with your team about the upcoming transition.
- Ensure they understand the importance of presenting a unified front and speaking positively about the new owner.
- Reassure your staff about their roles and the continuity of care, if applicable, and invite them to share concerns privately so they feel heard.

An informed, confident team can serve as ambassadors for the new doctor and dramatically improve patient confidence.

### 2. Create Trust Through Word-of-Mouth

In the age of online reviews and real-time reputation management, **internal referrals from staff** are more potent than ever. Let your team become the bridge to the new dentist.

- Allow the new doctor to provide dental services to staff and their families ahead of the transition.
- Encourage staff to share positive experiences with patients, especially when discussing upcoming appointments.
- Reinforce your confidence in the new owner during team meetings—your endorsement goes a long way.

### 3. Ease Patients Into the Change

Today's dental patients are informed and emotionally invested in their healthcare providers. Abrupt change can lead to confusion or even patient attrition, but a gradual transition helps prevent this.

- Offer a **joint transitional period**, even if part-time, during which you and the new dentist are present in the office.
- Introduce the new dentist, in person, during hygiene checks or post-treatment consultations.

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# Leaving a Legacy in 2026: The Right Way to Say Goodbye to Your Patients

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- To build familiarity, allow the new doctor to begin handling simple appointments or emergency visits.
- Highlight practical benefits, such as **faster appointment availability** or expanded services that the new provider may offer.

## 4. Communicate the Transition Clearly and Positively

One of the most meaningful things you can do for your patients is to communicate openly about your departure—and your confidence in your successor.

- Send a personal letter or email to your patients outlining your decision to retire or move on.
- Post a thoughtful announcement on your practice's website and social media channels.
- Share key details about the new dentist's credentials, background, and philosophy of care.
- Include a heartfelt note thanking your patients for their loyalty and trust throughout your career.

A warm, confident message helps reassure patients that they are in good hands and invites them to embrace the future of your practice.

## 5. Be Transparent About Your Next Chapter

Whether you're retiring, relocating, or shifting focus to another area of dentistry or business, let patients know your "why" without oversharing.

Framing your transition around gratitude and forward momentum creates a narrative of growth and continuity:

- "After 30 fulfilling years, I've decided to retire and spend more time with my family."
- "I'm stepping away to pursue new passions, but I will always be grateful for the relationships I've built in this community."
- "This decision wasn't easy, but I know I'm leaving the practice in competent hands."

Patients will appreciate your honesty, especially when paired with a decisive vote of confidence in the new owner.

## 6. Leave a Lasting Impression

Your legacy isn't defined by your departure—it's shaped by **how you leave**.

- Ensure your last weeks in the practice reflect the same quality, compassion, and professionalism that built your reputation.
- When possible, thank patients individually.
- Reiterate your team's commitment to exceptional care, even after your exit.

This kind of graceful departure builds trust, protects patient retention, and solidifies your reputation for years to come.

## Final Thought

Your dental practice is more than just a business—it's a legacy. By handling your exit with care, communication, and compassion, you not only secure your financial future but also pass the torch with pride.

Whether you're just starting to consider a sale or preparing for a handoff later this year, we're here to help guide every step of your transition.

# Pre-Listing Checklist for Dentists

## Maximize Value. Minimize Surprises. Transition Smoothly.

Thinking of selling your dental practice in the next 1–3 years? Use this checklist to ensure your practice is financially strong, operationally ready, and strategically positioned for a successful transition.

### Practice Performance & Financials

- **Maintain Full Hours of Operation**  
Avoid reducing your schedule in the years leading up to retirement.
- **Sustain or Increase Production**  
Keep up clinical volume and prioritize profitable procedures.
- **Review P&L Statements (3–4 years)**  
Ensure clean, accurate financials with a healthy net profit margin.
- **Control Overhead**
  - Staff wages at 24%–26% of revenue
  - Supplies at 6%–8%
  - Lab fees at 6%–7%

# Pre-Listing Checklist for Dentists

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- **Update Your Fee Schedule**  
Adjust fees to reflect current market rates and boost net income.
- **Eliminate Personal Expenses from Business Accounts**  
Avoid blending personal or non-practice-related expenses in your books.

## Facility, Equipment & Technology

- **Assess Office Aesthetics**  
Fresh paint, flooring, lighting, or cabinetry updates can enhance appeal.
- **Upgrade Outdated Equipment**  
Replace any visibly aged or non-functional equipment if feasible.
- **Implement Modern Technology**  
Ensure digital X-rays, intraoral cameras, chartless systems, etc., are in place.

## Real Estate & Lease Management

- **Own the Property?**  
Decide whether you will include it in the sale or lease it back.
- **Lease the Property?**
  - Review lease terms
  - Ensure assignment is allowed
  - Renegotiate if near expiration
- **Consult a Real Estate Attorney**  
Make sure your lease or sale terms are aligned with transition goals.

## Staffing & Human Resources

- **Review Staff Roles & Compensation**  
Ensure all roles are productive and compensation aligns with industry benchmarks.
- **Limit Major Changes to Staff Before Sale**  
Buyers value continuity—avoid layoffs or restructuring without a plan.
- **Plan for Family Member Transitions**  
Have a clear succession plan if a spouse or relative will exit with you.

## Transition Planning & Legal Readiness

- **Meet with Your Accountant**  
Understand tax implications and prepare historical financial data.
- **Consult a Financial Advisor**  
Confirm you're personally ready for retirement or semi-retirement.
- **Organize Legal Documents**
  - Entity documents
  - Tax returns
  - Employment agreements
  - Vendor contracts
  - Lease or title documents

## Patient Communication & Marketing Assets

- **Maintain a Clean, Updated Website**  
Ensure your site reflects a modern, professional image.
- **Secure Your Patient Records**  
Ensure your software and backups are up to date and HIPAA-compliant.
- **Prepare for Patient Communication**  
Craft a positive transition message for email, letters, and in-office signage.

## Talk to a Transition Consultant

- **Schedule a Practice Valuation**  
Understand your practice's fair market value.
- **Identify Timing & Exit Strategy**  
Set a transition timeline that aligns with your personal and professional goals.
- **Develop a Confidential Marketing Plan**  
Work with a broker to attract ideal-fit buyers discreetly and efficiently.

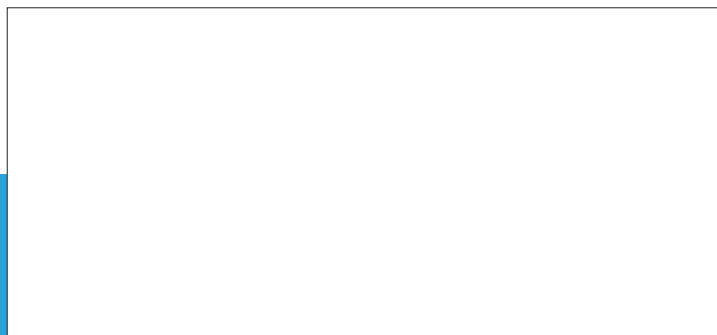
## Ready to Begin?

This checklist is your roadmap to a profitable, low-stress practice transition. The earlier you begin preparing, the more options—and value—you'll have.

Need help evaluating your readiness or boosting your practice value before listing? Let's schedule a consultation and create your custom transition plan.



96 Park Street • Montclair, NJ 07042  
1159 2nd Avenue • New York, NY 10065



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## What Our Clients Have To Say About Us Matters

"Mark Epstein is calm, knowledgeable, patient. He utilizes his considerable experience to the benefit of the seller and the buyer. I was impressed with his abilities to bring a smooth sale of my practice. I am sure I am one of the many win, win outcomes."

– Christos Tsiatis, DDS | Bayside, NY

"Mark Epstein did a fabulous job helping me sell my practice. He found someone who was a great fit for my office and my patients. His experience and knowledge helped facilitate a smooth transition."

– Maxine Feinberg, DDS (Past President ADA) | Cranford, NJ



Mark Epstein

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**Contact us TODAY to schedule  
a free consultation!**

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