



Prepared For: Dr. \_\_\_\_\_

CRITICAL PATH / ACTION PLAN & TIMELINES: Prepared by: Timothy Brown Date: \_\_\_\_\_ 2025

ACTION ITEM	COMPLETION DATE: (on or before)	PERFORMED BY: (task leader name)
APPRAISAL "AS OF" DATE	On or before April 30 <sup>th</sup> is ideal timing	www.roicorp.com – Timothy is Broker of Record
DRAFT APPRAISAL delivered	20 to 30 days after site inspection	A ROI Associate will hand deliver to discuss
FINAL APPRAISAL delivered	10 to 15 days after draft is published	Timothy will send a copy to you, your CPA and LLB
POSTED TO ROI NLS	15 days after appraisal is finalized – Fridays	Timothy will approve the NLS posting on a Thursday
FILM CREW ARRIVES	Optional cinematic film for remote locations	Timothy will engage filmmaker and edit
REAL ESTATE APPRAISAL	If applicable – is property also for sale?	Timothy can also appraise the real estate if needed
OPEN DATE / WEBINAR	This is the day we allow buyers in - SUNDAY	A ROI Associate will host the Open and greet buyers
OFFERS DUE (DEPOSITS)	15 days after the Open date	Timothy will structure and draft all offers
ACCEPTED OFFER BY VENDOR	10 days after best offer is received	Timothy consults with you as to best terms
CONDITIONS REMOVED	20 days for due diligence & 30 days for bank	Timothy manages this critical phase
CONTACT LANDLORD	Request lease transfer 30 days before close	Timothy will contact your landlord
LANDLORD APPROVAL	Purchaser portfolio to LL 30 days before close	Timothy will present portfolio to LL
NOTIFY EMPLOYEES	Owner to call staff meeting – but only when the purchaser removes <u>ALL</u> Conditions	You host the meeting 1 week before close Timothy to supply script for staff meeting
CLOSING DATE	On or before December 15 <sup>th</sup> Thursdays are best day - end of month	Wait for your lawyer to say "CLOSED" then go pick up the cheque and go to your bank! Champagne time!
TAKE A VACATION!	To where?	With whom?
OFFICE VISIT PROTOCOL	Alarm Y / N - who has Keys?	Is Professional building door locked on Sundays?
DENTAL SOFTWARE	UN = _____ PW = _____	Remote access software = PC anywhere
CLIENT CONTACT METHOD	Phone/Text ( ____ ) ____ - _____	Always TEXT client 24 hours prior to office entry
ACCOUNTANT (name)	Include email and phone #	Has the CPA purified the PC & is spouse qualified SH?
LAWYER (name)	Include email and phone #	Send LLB our precedent OTP for shares
ASSOCIATE TERMS	Tues, Wed, Thurs for 2 years @ 50% after lab	How many weeks Vacation per year?