

# Next Point Advises Multi-Location Physical Therapy Practice in Owner-Centered Healthcare M&A Transaction

*The transaction reflects the increasing importance of deal structure, buyer fit, tax planning, and personal readiness for owners of multi-unit practices.*

NY, UNITED STATES, July 7, 2026

/EINPresswire.com/ -- [Next Point LLC](#) served as the exclusive M&A advisor to Orthopedic & Balance Therapy Specialists (“OBTS”), a seven-location outpatient physical therapy practice, in its recently completed sale to a national rehabilitation platform. Terms of the transaction were not disclosed.



A SUCCESSFUL HEALTHCARE M&A TRANSACTION REQUIRES MORE THAN FINDING A BUYER.

THE STRONGEST EXITS ARE PLANNED AROUND THE OWNER'S GOALS, NOT JUST THE PURCHASE PRICE.

Jui Trivedi  
Managing Partner, Next Point LLC

next point

Next Point advised the owners of a multi-location physical therapy practice through a successful healthcare M&A transaction.

Jui Trivedi, Managing Partner

Founded in 2003, OBTS grew into one of Northwest Indiana’s leading outpatient physical therapy providers. The practice built its reputation through clinical excellence, strong patient outcomes, referral relationships, and a deep commitment to the communities it served.



Early planning helps owners assess after-tax impact, align proceeds with long-term goals, and clarify what the sale must achieve personally and financially.”

*Lee Woodring*

The transaction comes at a time when owners of multi-location healthcare practices are evaluating transition options in a more sophisticated M&A environment. For physical therapy, dental, specialty medical, and other healthcare clinic owners, a successful sale is rarely defined by valuation alone. Buyer fit, transaction structure, tax impact, legal terms, leadership continuity, and the owner’s

personal financial objectives can all materially affect the outcome.

Next Point led the sale process for OBTS from preparation through closing, including valuation guidance, buyer outreach, buyer evaluation, negotiation support, due diligence coordination, and transaction execution. The firm also worked closely with the owners’ professional advisory

team to help align the transaction process with the shareholders' broader business and personal objectives.

"A successful healthcare M&A transaction requires more than finding the right buyer," said [Jui Trivedi](#), Managing Partner of Next Point. "For owners of multi-unit healthcare practices, the strongest exits are planned around the owner's goals, not just the purchase price. Our role was to help the shareholders understand their options, evaluate buyer fit, negotiate structure, and move through the process with the clarity required for a successful transition."

Throughout the transaction, Next Point worked closely with the shareholders' broader advisory team, including their CPA, attorney, and private wealth advisor. Lee Woodring, Managing and Founding Principal of Woodring Leroy Capital Advisors, served as private wealth advisor to the shareholders, providing financial planning guidance in connection with the transaction.

As Certified Exit Planning Advisors, Trivedi and Woodring brought an exit-planning perspective to the process, helping evaluate how deal structure, tax considerations, liquidity needs, and long-term financial goals could affect the shareholders' after-closing outcome.

"Pre-sale planning is essential when a business owner is preparing for a significant liquidity event," said Woodring. "By engaging early, owners can better evaluate the after-tax impact of a transaction, align proceeds with long-term financial objectives, and make decisions with a clearer understanding of what the sale needs to accomplish personally and financially."

For owners of growing healthcare practices, early planning can be especially important when the business has multiple locations, a larger employee base, referral relationships, payer considerations, and continued leadership needs after closing. These factors can make transaction readiness and advisor coordination a meaningful part of the outcome.

"Healthcare practice owners are often making one of the most important financial decisions of their lives while still operating the business every day," Trivedi added. "The right M&A process gives the owner a framework to evaluate not only enterprise value, but also structure, risk, timing, continuity, and what life should look like after closing. That is where thoughtful process design matters."

The transaction positions OBTS to continue serving patients, employees, and referral partners with the support of a larger rehabilitation platform while preserving the clinical focus and community commitment that have defined the practice for more than two decades.

#### About Next Point LLC

Next Point LLC is a mergers and acquisitions advisory firm serving clients nationwide. The firm advises privately held business owners and healthcare practice owners through strategic exits, ownership transitions, and M&A transactions. Next Point works with businesses across industrial, manufacturing, distribution, dental, physical therapy, and specialty medical practice

sectors.

With experience spanning more than 450 completed transactions, Next Point delivers sell-side representation, valuation guidance, buyer outreach, negotiation support, due diligence coordination, and transaction execution. The firm works closely with clients' CPAs, attorneys, and wealth advisors to help owners prepare for and execute successful transitions.

Cathy Willig

Next Point LLC

+1 716-847-1485

willig@nextpointllc.com

Visit us on social media:

[LinkedIn](#)

---

This press release can be viewed online at: <https://www.einpresswire.com/article/925052191>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2026 Newsmatics Inc. All Right Reserved.