



The Essential Roadmap to Launching Your Mental Health Private Practice

Start Smart, Stay Confident, and
Build a Practice You're Proud Of!



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Introduction



Let's Keep It Real:

Starting your own private practice is more than just a dream—it's a big step. It's exciting, it's empowering, and yes, it can feel overwhelming. But here's the truth: you don't have to figure it out alone.

This free checklist isn't just a list—it's a blueprint for your success. Whether you're still clocking in at your 9-5, running sessions on the side, or ready to go all-in, this guide will keep you focused, clear, and confident every step of the way.



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1. BUILD A SOLID BUSINESS FOUNDATION

- Choose the Right Business Structure: LLC, PLLC, or Sole Proprietor?
- Get Your EIN (Employer Identification Number)
- Register Your Business with Your State
- Secure Professional Liability Insurance (Non-negotiable!)
- Draft Your Client Intake, Consent, and Policy Documents
- Understand and Implement HIPAA Compliance

Why This Matters: The strongest practices start with a solid legal and business foundation. Don't cut corners here—you'll thank yourself later!

2. MASTER YOUR MONEY FROM DAY ONE

- Open a Dedicated Business Bank Account
- Set Up a Bookkeeping and Accounting System (Hint: Automate what you can!)
- Decide on Your Fee Structure and Payment Policies
- Choose Your Payment Model: Private Pay, Insurance, or Both?
- Explore Insurance Credentialing (if accepting insurance)

Why This Matters: Clear finances mean less stress, better planning, and a practice that thrives—not just survives.



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3. DESIGN YOUR IDEAL PRACTICE SPACE

- Decide: Telehealth, In-Person, or Hybrid?
- Choose a HIPAA-Compliant Phone and Email System
- Select a Practice Management Software (Your virtual assistant!)
- Create a Professional Website That Works for You
- Build a Space That Feels Safe, Warm, and Professional

Why This Matters: Whether it's a cozy therapy room or a secure virtual space, your environment sets the tone for every client session.

4. MAKE YOURSELF UNFORGETTABLE: BRANDING & MARKETING

- Define Your Niche and Ideal Client (Who are you here to serve?)
- Build a Professional Website That Converts Visitors into Clients
- Set Up Social Media Profiles That Reflect Your Brand
- Create a Marketing Plan That Feels Authentic to You
- Build Relationships Through Networking and Collaboration

Why This Matters: The right clients can't find you if they don't know you exist. Marketing doesn't have to feel salesy—it should feel aligned.



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5. BE CLINICALLY READY TO SHINE

- Stay on Top of State Licensing Requirements
- Complete Necessary Continuing Education Units (CEUs)
- Develop Your Specialty Services and Signature Style
- Prepare Your Client Documentation and Assessment Tools
- Set Clear Ethical Guidelines for Your Practice

Why This Matters: Clinical readiness isn't just about paperwork—it's about showing up fully prepared to serve your clients with excellence.

6. BUILD A MINDSET THAT MATCHES YOUR GOALS

- Get Clear on Why You're Starting This Practice
- Set Short-Term and Long-Term Goals That Actually Inspire You
- Plan for Work-Life Balance (Burnout is NOT the goal!)
- Find a Coach or Mentor Who's Been Where You Want to Go
- Celebrate Every Single Win—Big or Small

Why This Matters: Your mindset is your greatest tool (or your biggest roadblock). Let's make sure it's serving you.



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7. PLAN FOR GROWTH, NOT JUST SURVIVAL

- Think Beyond Today: What's Your 3-Year Vision?
- Identify Opportunities for Scaling and Expanding Your Services
- Stay Curious: Keep Learning and Adapting as You Grow
- Don't Be Afraid to Ask for Help When You Need It

Why This Matters: A sustainable practice isn't built overnight, but it is built with intention.





A Personal Note From Me

Starting your private practice is one of the bravest, boldest moves you can make. But you don't have to do it alone, and you don't have to guess your way through it.

This checklist is just the beginning. If you're ready to dive deeper, create a custom action plan, and have someone guide you every step of the way—I'm here.

Your dream practice is within reach. Let's build it together.



Schedule Your Free 15 minute
Discovery Call Today