

## Information you need to Sell your Business

Name of Business: \_\_\_\_\_  
Business Type: \_\_\_\_\_  
Business Address: \_\_\_\_\_  
Seller: \_\_\_\_\_  
Business Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Reason for Selling: \_\_\_\_\_

### GENERAL INFORMATION

Age of Business: \_\_\_\_\_ Number of employees: FT \_\_\_\_\_ PT: \_\_\_\_\_  
Years owned by seller: \_\_\_\_\_ Days open: \_\_\_\_\_ Hours open: \_\_\_\_\_  
Hours worked by seller: \_\_\_\_\_ Seating capacity: \_\_\_\_\_ Parking: \_\_\_\_\_  
Building size: \_\_\_\_\_ Lot Size: \_\_\_\_\_ Zoning: \_\_\_\_\_  
Rent: \$ \_\_\_\_\_ Term: \_\_\_\_\_ Exp. Date: \_\_\_\_\_  
Rent options: \_\_\_\_\_ Rent deposit: \_\_\_\_\_  
Rent adjustments: \_\_\_\_\_  
Miscellaneous: \_\_\_\_\_

### FINANCIAL INFORMATION

\_\_\_\_\_ Minimum three years profit or loss statements  
\_\_\_\_\_ Minimum three years of balance sheets  
\_\_\_\_\_ Minimum three years tax returns

### INFORMATION REQUESTED FOR BUSINESS VALUATIONS CHECK WHEN COMPLETED. IF NOT APPLICABLE, WRITE N/A

- \_\_\_\_\_ A) \_\_\_\_\_ Copy of real-estate lease and assignment|  
\_\_\_\_\_ B) \_\_\_\_\_ Copy of underlying contracts, (business and real-estate)  
\_\_\_\_\_ C) \_\_\_\_\_ Copy of business equipment lease.  
\_\_\_\_\_ D) \_\_\_\_\_ Copy of partnership agreement  
\_\_\_\_\_ E) \_\_\_\_\_ List of corporate officers and business ownership percentage.  
\_\_\_\_\_ F) \_\_\_\_\_ Copy of business licenses, (city, state & corporate, etc.)  
\_\_\_\_\_ G) \_\_\_\_\_ List of furniture, fixtures & equipment and est. replacement value.  
\_\_\_\_\_ H) \_\_\_\_\_ Inventory value  
\_\_\_\_\_ I) \_\_\_\_\_ Accounts receivable aging and value  
\_\_\_\_\_ J) \_\_\_\_\_ Accounts payable aging and value  
\_\_\_\_\_ K) \_\_\_\_\_ Business attorney, address and phone number.  
\_\_\_\_\_ L) \_\_\_\_\_ Business accountant, address and phone number.  
\_\_\_\_\_ M) \_\_\_\_\_ Insurance company, agent address and phone number.  
\_\_\_\_\_ N) \_\_\_\_\_ Escrow company, address, phone number and account number.  
\_\_\_\_\_ O) \_\_\_\_\_ Brief history of company.