

Date _____

Buyer Name (Individual) _____ Spouse/Partner Name _____

Buyer Entity Name (if other than individual) _____ EIN _____

Buyer Address _____

Email Address _____

Work Phone _____ Cell Phone _____ Home Phone _____ Fax _____

What do you do now? _____

Types of businesses you have owned (if applicable) _____

Your Ownership strengths _____

Your Ownership weaknesses / dislikes _____

Business Advisors (CPA/Attorney) _____

Your Education level / years _____

How many months have you been looking at businesses to purchase? _____

What types of businesses are of interest to you and WHY? _____

What is your approximate Net Worth? \$ _____

How much are your total cash + liquid assets NOT in retirement plans? _____

How much are your total cash + liquid assets ARE in retirement plans? _____

Did you know that you can use your IRA and/or retirement funds towards the purchase (DOWN PAYMENT ETC.) of a business WITHOUT PENALTY OR INCURING A TAX LIABILITY? _____

How much cash do you have available for a down payment? _____

After your down payment, do you have sufficient funds available for initial working capital, etc. requirements? _____

Will you need 3rd Party financing to purchase a business? _____

Do you expect the seller to finance a portion of the purchase price? _____ If yes, how much? _____

Have you already started the process to obtain a bank / SBA loan to purchase your business? _____

If not, have you ever applied for or obtained a bank or SBA loan for a business or commercial purpose? _____

If known, what is your credit score? _____

What is your business purchase price range (totals of down payment + financing)? _____

What minimum level of cash flow after all loan payments is required during your first year of ownership? _____

Who, other than yourself, will be involved in the purchase decision? _____

Who, other than yourself, will be involved in the operation of the business? _____

How many weeks before you can take possession? _____

Additional comments _____
