



Things You'll Need to Get Started -Sellers

1. 3 years tax return
2. 3 years financial statements
3. Most current partial year financial statement
4. Corporate Resolution, if incorporated
5. Description of Business
 - A. Nature of Core Business
 - B. Business/Marketing Strategies
 - C. Summary of Workforce/Employees
 - D. Aging Analysis of Accounts Receivable/Inventory
 - E. Sales Analysis by Major Customers/Channels
 - F. Summary Description of Facilities & Hours of Operation
6. List of Assets and Fair Market Values
7. Copy of Lease, if any, any Summary of Lease Terms
8. Real Estate appraisal, if any, if offered for sale
9. Listing/Representation Agreement, if any

Things You'll Need to Get Started – Buyers, Individuals

1. Buyer's Personal Profile
 - A. Name, Addresses, Phone Numbers, Interests, Specs & Advisors
 - B. Resume of Professional Experience & Education
 - C. Personal Financial Statement
 - D. Credit Report Authorization
 - E. Financial Information Authorization
2. Confidential Disclosure Agreement

Things You'll Need to Get Started – Buyers, Corporations, Intuitions

1. Buyer's Profile
 - A. Name, Addresses, Phone Numbers, Interests, Specs.
 - B. Resume of Significant Deals Closed
2. Financial Statement
3. Confidential Disclosure Agreement

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