

Request For Proposal



Needed Information For Listing Evaluation:

Advanced Business Brokers

Business Name: _____ Owner(s): _____

Phone: _____ Email: _____

Desired Asking Price: _____

Required Items:

Financial Documents: Last 3-years** Financial Statements (Income / P&L Statement)
 Current YTD P&L with Previous Year Comparables if more than 3 months
** 5-years recommended if over 1 million in revenue
 Most recent Balance Sheet available

Tax Returns: Are you current Y N List year of last return _____
(These will be needed by qualified buyers in due diligence)

Accounting Software: What do you use _____
Are you able to produce P&L reports on demand Y N
Are you able to provide projected P&L for next year Y N

Corporate Structure: Sole Proprietor Partnership S-corporation
 C-corporation Limited Liability Corporation

Real Estate: Locations: Single / Multiple # _____ (attach information on each)
 Owned / Leased Mo. Payment: _____ Sq Ft: _____
If owned: Pay rent Y N / At current mkt rate Y N
 Supply address(es) & most recent tax bill(s)
Estimated Value: _____

of Employees: FT _____ PT _____ Independent Contractors _____

Owner Payroll: Weekly Hours: _____ Compensation: _____

Working Spouse: Weekly Hours: _____ Compensation: _____

Owner Details: Active/Owner Operator Semi Passive Passive
 Attach information on owner's daily workload and tasks.
(and spouse's if working in the business with or without pay)

Estimated Value of Equipment: _____

List of Benefits Paid on Owner's Behalf: (Insurance, retirement plans etc)

Personal Expenses / Perks Run Through the Business: (Could be legitimate tax write off, but not necessarily required – call if you have questions)

Additional Comments: (Any extraordinary or one-time events, good or bad, in the recent past or anticipated in the coming year? Any other substantial changes foreseen in the upcoming year?)

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The information obtained here is considered confidential and will be used for listing evaluation purposes by the team at Advanced Business Brokers a division of Advanced Business Advisors, LLC. This information will not be shared with others without prior authorization from the submitting party.